THE ECONOMIC IMPACT OF THE ARTS IN ONTARIO

EXECUTIVE SUMMARY

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COMMISSIONED BY THE ONTARIO ARTS COUNCIL, OCTOBER 1987

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SUMMARY: THE ECONOMIC IMPACT OF THE ARTS IN ONTARIO

A Report Prepared for the Ontario Arts Council
by G. Wall and M. Purdon

The purpose of this report is to provide an economic perspective on professional arts activity in Ontario. It examines the volume, diversity and implications of financial transactions associated with the arts and related employment.

The data for the report are derived primarily from published documents, supplemented by information gathered from personal and telephone interviews with key personnel in government and the arts.

MAGNITUDE OF THE ARTS SECTOR

Arts activity in Ontario and Canada is concentrated in Toronto. However, the last two decades have witnessed increased development of the arts in communities throughout the province. There has been considerable growth in the diversity and number of arts organizations. For example, in 1985-86, the OAC processed more than 3,000 grants across some 90 granting programs, for grant expenditures of $21,000,000 and in direct-service programs of $889,000.

Employment: In 1981, arts-related employment in Canada was almost as large as employment in agriculture or the federal government, excluding crown corporations. Ontario accounted for 44 per cent, or 182,160 of all arts-related jobs in 1981. Almost half of the country's visual artists live in Ontario, as do more

than half the actors, actresses and musicians. Ontario produces between 75 and 90 per cent of all English-language Canadian books, feature films, sound recordings and television drama.

Industry Comparisons: A comparison of the country's arts industry to the 20 largest Canadian manufacturing industries has placed the arts industry 9th in revenue, 4th in number of persons employed, and 6th in expenditures on wages and salaries. In comparison to other industries, the direct economic impact of the arts and culture sector is somewhat larger than the tobacco, rubber, textile, clothing, or furniture and fixture industries, and about the same as the metal and mines, food and beverage, electrical power, gas and other utilities, or the accommodation and food-service industries.

Growth Rate: Between 1971 and 1981, the arts labour force grew at a much faster rate than the total labour force, or the population itself. The total provincial labour force expanded by 33 per cent during this period, whereas Ontario's experienced arts labour force increased by 66 per cent, or 44,765 workers.

Female Employment: In 1981, women constituted 41 per cent of the experienced arts labour force, although the proportion varied considerably between disciplines. Growth in female employment in the arts has been particularly striking: 91 per cent between 1971 and 1981.

Education and Age: Artists tend to be significantly better educated and also younger than the labour force as a whole.

Artists' Incomes: More than half (54 per cent) of self-employed artists had no taxable income in 1980. Average income in 1971 constant dollars fell from $4,835 in 1974 to $4,352 in 1980. In addition, the 10,000 fine-arts employees were as financially impoverished as the self-employed artists. The Canada Council has concluded that "no artistic profession such as dancer, musician or actor provided a working season of sufficient length or with sufficient salary to support a family of four above the poverty line."

MAGNITUDE AND CHARACTERISTICS OF THE ARTS AUDIENCE

Size: The size of the fine arts audience in Ontario in 1986 was estimated to be 2,838,600 individuals. Attendance figures are considerably greater than this. For example, the 1986 estimate of attendance for the performing arts is more than six million.

Growth: Considerable growth has occurred in both the size of the arts audience and levels of public participation. From 1961 through 1981, the fine arts audience grew from 1.4 million, or 12 per cent of the Canadian population, to 5.1 million, or 28 per cent of the population. This growth is projected to continue, fueled by rising levels of education, changes in the composition of the labour force, the "greying" of the population, and changes in the nature of consumption.

There has also been a considerable broadening of the audience base: in 1983, significantly more people in Ontario attended plays and musicals (55 per cent), ballet and modern dance performances (23 per cent) and symphonic and other classical concerts (33 per cent)

than in 1974. A 1983 survey indicated that 74 per cent of Ontarians reported that in the 12 months previous they had visited a library at least once, 56 per cent had visited a museum or art gallery, 55 per cent a live play or musical, 52 per cent a presentation of arts and crafts, 33 per cent a classical music concert, 23 per cent a performance of ballet or modern dance, and 13 per cent an opera or operetta.

Key Factors: The sociodemographic variables of education, income, age, occupation and gender are strongly related to arts presentation. Three fundamental changes in the profile of the population--rising education, increasing participation of women, and the aging of the population--are interacting to affect change both in the economy and participation in the arts.

In the context of the rest of the country, Ontarians are both major producers and consumers in the arts industry. With attendance at performances of performing arts groups totalling 6 million in 1985, Ontario audiences spent nearly $50 million on tickets. However, cost is a major factor affecting attendance, especially for young adults, females, those with lower incomes, and frequent participants who would like to be able to attend more often.

DIRECT ECONOMIC IMPACTS

Government Funding: In 1982-83, 27.7 per cent of governmental cultural expenditures in Ontario were made by the federal government, 36.2 per cent by the provincial government and 36.2 per cent by local government.

The federal government's expenditures on culture in 1982-83 constituted 0.4 per cent of its gross general expenditures. Cultural expenditures rose to a peak in 1978-79, since then they have declined in real terms by 19.1 per cent.

In 1982-83, the Ontario Government spent 0.5 per cent and municipal governments 1.8 per cent of gross expenditures on culture. There has been a slight rise in both provincial and municipal financial support for culture in Ontario since the 1970s. Ontario is approximately average among the provinces in this trend.

Private Funding: Private donations and other forms of private support, including corporate funding, are extremely important to the arts in Ontario. In 1984-85 private support was $2.707 million and constituted 14 per cent of the support received by performing arts organizations in Ontario which were also funded by the Canada Council.

The Council for Business and the Arts in Canada reported in a 1986 survey that 65 of its members (constituting 54 per cent of its membership) made more than $71 million in corporate donations in Canada, of which 12.5 per cent was directed to arts and culture. The average annual arts donation per CBAC member is now approximately $140,000.

Galleries and museums depend less on private donations and more on government funding than those performing arts organizations that are successful in attracting corporate donations.

Earned Revenues: Box-office revenues are a prime source

of income for arts organizations. For example, those professional arts organizations in Ontario funded by the Canada Council generated an earned income in excess of $47 million, of which 90.9 per cent was from box-office receipts. Of their total revenue of almost $95 million, 55 per cent was earned, 30 per cent came from governmental sources, and 14 per cent came from private donations. Such revenues constitute the incomes of arts organizations, and, in some cases, individual artists. They are injected into the Ontario economy when they are spent.

INDIRECT ECONOMIC IMPACTS

Spending by Artists: Figures for the precise number of people employed in the arts, and their associated incomes and expenditures, vary with the definition of the arts and, in particular, whether one is concerned with the arts industry or the arts labour force. Only a third of the arts labour force is actually employed in the arts industry. The total wages and salaries of the arts labour force in Ontario in 1981 exceeded $1,360 million. This money is disbursed into the Ontario economy in much the same way that other Ontarians spend their money, penetrating all sectors of the provincial economy.

Many artists make a variety of specific expenditures as a consequence of the practice of their art. Such requirements give rise to specialized businesses to cater to these needs. For example, Toronto and Kitchener-Waterloo Symphony musicians have individual annual expenditures of $4,234 and $1,586 respectively, on items associated with performing.

Spending by the Arts Audience: As a by-product of their attendance at arts events, members of the audience spend money on a wide variety of purchases, including transportation, food, accommodation, babysitting, parking and souvenirs. The nature and magnitude of these expenditures is illustrated in the report, and the links between the arts and tourism are discussed.

INDUCED IMPACTS

It has been frequently stated, but seldom proved, that businesses are attracted to places with a high-quality social environment, including the availability of superior artistic and cultural facilities. Such claims are documented through detailed investigations of the impacts of arts festivals at Blyth, Elora, Niagara-on-the-Lake and Stratford. The attraction and creation of new business and employment are demonstrated. Furthermore, the beneficiaries of increased economic activity are not confined to those establishments directly related to the artistic or cultural event, or to tourism, but permeate all sectors of the economy.

CASE STUDIES

Synopses of a number of recent economic studies of the arts in Ontario are presented. Some of the studies are of specific events, others are of artistic activities in particular regions. But, whatever the approach, all the studies draw attention to the economic significance of artistic activities for the communities in which they take place. The following situations are discussed: the Tutankhamun and Van Gogh exhibitions at

the Art Gallery of Ontario; studies of the Stratford, Shaw, Blyth and Elora Festivals and the Toronto International Festival; the Toronto and Kitchener-Waterloo symphony orchestras; and the impacts of the arts in Hamilton, Pembroke, Kingston and Sudbury.

SOCIO-CULTURAL IMPACTS

In order to place the investigation in a broader context, and to complement the economic analyses, some socio-cultural impacts of the arts are discussed briefly.

OVERVIEW

A conservative overview of the economic impact of the arts industry on Ontario and Canada is presented through Canada Council statistics. In 1983, arts industry employment in Ontario was 107,769 and arts-related employment was 182,160. Arts industry revenue was $4,248 million, of which $1,446 million was spent on wages and salaries.

With 35.4 per cent of the national population, Ontario was estimated to have 46.0 per cent of the arts activity in the country. The provincial economic impact of the arts industry is indicated as being $6,797 million. The contribution of the Ontario arts industry to the national economy is calculated to be $8,920 million.

L'IMPACT ÉCONOMIQUE DES ARTS EN ONTARIO

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OCTOBRE 1987

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SOMMAIRE : L'IMPACT ÉCONOMIQUE DES ARTS EN ONTARIO

Rapport préparé pour le Conseil des arts de l'Ontario par G. Wall et M. Purdon

Le présent rapport a pour objet l'étude, du point de vue de l'économie, des activités artistiques professionnelles en Ontario. Il comporte un examen du volume, de la variété et des implications des opérations financières associées aux arts et aux emplois connexes.

Les données du rapport sont essentiellement tirées de documents publiés, auxquels se sont ajoutés des renseignements obtenus grâce à des rencontres et à des entrevues téléphoniques avec des personnes clés de l'administration gouvernementale et du secteur artistique.

IMPORTANCE DU SECTEUR ARTISTIQUE

L'activité artistique en Ontario - et au Canada - est concentrée à Toronto. Toutefois, au cours des deux dernières décennies, les arts ont pris une importance accrue dans diverses localités de la province. Les organismes artistiques ont connu une croissance considérable, tant en variété qu'en nombre. Par exemple, en 1985-1986, le CAO a octroyé plus de 3 000 subventions et bourses par l'intermédiaire d'environ 90 programmes de subvention; le total des sommes octroyées s'est élevé à 21 000 000 $, tandis que les dépenses des programmes de service direct ont totalisé 889 000 $.

Nombre d'emplois: En 1981, il y avait au Canada presque autant d'emplois dans le secteur des arts que dans l'agriculture ou dans l'administration fédérale, exception faite des sociétés de la Couronne. Cette année-là, les Ontariens comptaient pour 44 % (182 160) de tous les emplois liés aux arts. Près de la moitié des

artistes visuels canadiens habitent en Ontario, comme plus de la moitié des comédiens et des musiciens du pays. L'Ontario produit de 75 % à 90 % de tous les livres, films, enregistrements sonores et dramatiques télévisés de langue anglaise du Canada.

Comparaisons entre industries : Parmi les vingt plus importantes industries canadiennes du secteur manufacturier, l'industrie artistique occupe le 9e rang pour les recettes, le 4e pour le nombre d'emplois et le 6e pour la rémunération et les salaires. L'impact économique direct du secteur des arts et de la culture est un peu plus important que celui des industries du tabac, du caoutchouc, du textile, du vêtement, du meuble ou des accessoires, et à peu près le même que celui de l'industrie métallurgique, des mines, des aliments et boissons, de l'énergie électrique, du gaz et des autres services publics ou du logement et des services d'alimentation.

Taux de croissance : Entre 1971 et 1981, la main-d'oeuvre du secteur artistique s'est accrue à un taux beaucoup plus élevé que l'ensemble de la main-d'oeuvre, voire de la population. En effet, la main-d'oeuvre totale de la province ne s'est accrue que de 33 % au cours de cette période, tandis que la main-d'oeuvre artistique expérimentée a augmenté de 66 % (44 765 personnes).

Nombre de femmes employées : En 1981, les femmes constituaient 41 % de la main-d'oeuvre artistique expérimentée, mais leur pourcentage variait considérablement selon les disciplines. Le pourcentage d'augmentation du nombre de femmes employées dans ce secteur a été particulièrement frappant (91 % entre 1971 et 1981).

Instruction et âge : Les artistes sont dans l'ensemble nettement plus instruits et aussi plus jeunes que la moyenne de la main-d'oeuvre.

Revenus des artistes : Plus de la moitié (54 %) des artistes travaillant à leur compte n'avaient pas de revenu imposable en 1980. Leur revenu moyen, en dollars constants de 1971, est tombé de 4 835 $ en 1974 à 4 352 $ en 1980. En outre, la situation financière des 10 000 employés des arts était aussi mauvaise que celle des artistes indépendants. Le Conseil des arts du Canada a jugé que la saison des spectacles de danse, de musique ou de théâtre n'était jamais assez longue et les cachets jamais assez élevés pour qu'un artiste professionnel puisse faire vivre une famille de quatre personnes au-dessus du seuil de pauvreté.

IMPORTANCE ET CARACTÉRISTIQUES DU PUBLIC DES ARTS

Importance : En 1986, on a estimé à 2 838 600 personnes le public des arts en Ontario, et le nombre de spectateurs est beaucoup plus élevé. Par exemple, toujours pour 1986, on estime à plus de six millions de personnes l'auditoire total des arts du spectacle.

Expansion : L'expansion du public des arts n'a guère d'égale que l'intensification de sa participation. De 1961 à 1981, le public des arts est passé de 1,4 million (12 % de la population du Canada) à 5,1 millions de personnes (28 %). Cette augmentation devrait se poursuivre, car les gens sont plus instruits, la composition de la main-d'oeuvre change, la population vieillit et la nature de la consommation se transforme.

En outre, la base du public s'est considérablement élargie. En 1983, beaucoup plus d'Ontariens qu'en 1974 avaient assisté à des pièces de théâtre et des comédies musicales (55 %), à des spectacles de ballet et de danse moderne (23 %) et à des concerts symphoniques et autres spectacles de musique classique (33 %). Un sondage réalisé en 1983 a révélé que 74 % des Ontariens avaient

dit qu'au cours des 12 mois précédents, ils étaient allés au moins une fois dans une bibliothèque; 56 % étaient allés dans un musée ou une galerie d'art, 55 % à un spectacle de théâtre ou à une comédie musicale, 52 % à une exposition d'artisanat, 33 % à un concert de musique classique et 23 % à un spectacle de ballet ou de danse moderne; tandis que 13 % étaient allés voir un opéra ou une opérette.

Facteurs clés : Les variables sociodémographiques de l'instruction, du revenu, de l'âge, de l'occupation et du sexe sont étroitement liées à la présentation d'oeuvres et de spectacles artistiques. Trois changements fondamentaux du profil de la population (l'amélioration du niveau d'instruction, l'augmentation de la participation des femmes et le vieillissement de la population) se combinent pour transformer à la fois l'économie et la participation aux arts.

Comparativement aux autres Canadiens, les Ontariens sont à la fois de gros producteurs et de gros consommateurs d'art. Le total des Ontariens ayant assisté à des représentations de groupes d'art du spectacle s'est élevé en 1985 à 6 millions, ce qui représente près de 50 millions de dollars en billets. Toutefois, le coût est un facteur majeur de l'assistance aux spectacles, particulièrement pour les jeunes adultes, les femmes, les personnes à faibles revenus et les habitués, qui voudraient pouvoir aller plus souvent au spectacle.

IMPACTS ÉCONOMIQUES DIRECTS

Subventions gouvernementales : En 1982-1983, le gouvernement fédéral a totalisé 27,7 % des dépenses gouvernementales dans le secteur culturel en Ontario; le gouvernement provincial a compté pour 36,2 % du total et les divers gouvernements municipaux, pour 36,2 %.

En 1982-1983, les dépenses du gouvernement fédéral dans le secteur de la culture représentaient 0,4 % du total de ses dépenses brutes. Les dépenses dans le secteur culturel ont atteint un sommet en 1978-1979; en termes réels, elles ont baissé de 19,1 % depuis.

Toujours en 1982-1983, le gouvernement de l'Ontario a consacré 0,5 % et les gouvernements municipaux de la province 1,8 % du total de leurs dépenses brutes au secteur culturel. Il y a eu une légère augmentation de l'aide du gouvernement provincial et des gouvernements municipaux à la culture depuis les années 70. À cet égard, l'Ontario se situe à peu près dans la moyenne des dix provinces.

Appui du secteur privé : Les dons de particuliers et les autres formes d'appui du secteur privé, y compris les dons d'entreprises, sont des sources extrêmement importantes de financement pour les arts en Ontario. En 1984-1985, cet appui du secteur privé a totalisé 2,707 millions de dollars, soit 14 % de toute l'aide financière obtenue par des organismes ontariens des arts du spectacle aussi subventionnés par le Conseil des arts du Canada.

Le Conseil pour le monde des affaires et des arts au Canada a déclaré dans un sondage réalisé en 1986 que 65 de ses membres (54 % du total) avaient fait au Canada des dons d'entreprise totalisant plus de 71 millions de dollars, dont 12,5 % dans le secteur des arts et de la culture. Chaque année, le membre moyen de ce Conseil donne environ 140 000 $ aux arts.

Les musées reçoivent moins d'appui du secteur privé et ont plus besoin de subventions gouvernementales que les organismes des arts du spectacle qui réussissent à obtenir des dons d'entreprises.

Recettes gagnées : La vente de billets est une source de revenus d'importance capitale pour les organismes artistiques. Par exemple, les organismes artistiques professionnels de l'Ontario subventionnés par le Conseil des arts du Canada ont généré des revenus gagnés dépassant 47 millions de dollars, dont 90,9 % provenant des ventes de billets. Les revenus gagnés représentaient 55 % des recettes totales (près de 95 millions de dollars) de ces organismes; 30 % du reste provenait de sources gouvernementales et 14 % de dons du secteur privé. Ces recettes, ce sont les revenus des organismes artistiques et, dans certain cas, des artistes eux-mêmes, qui sont réinjectés dans l'économie de l'Ontario quand ils sont dépensés.

IMPACTS ÉCONOMIQUES INDIRECTS

Dépenses des artistes : Les statistiques sur l'effectif précis des gens travaillant dans le secteur artistique et sur leurs revenus et leurs dépenses varient selon la définition des arts et, plus particulièrement, selon que l'on s'intéresse à l'industrie des arts ou à sa main-d'oeuvre. Le tiers seulement de la main-d'oeuvre du secteur artistique est en fait employé par cette industrie. En Ontario, le total de la rémunération et des salaires de la main-d'oeuvre de ce secteur dépassait en 1981 1,360 milliard de dollars. Artistes et employés du secteur artistique réinjectent cet argent dans l'économie ontarienne dans tous les secteurs de l'économie, à peu près exactement de la même façon que les autres Ontariens dépensent.

Beaucoup d'artistes font des dépenses directement liées à la pratique d'un art. Pour répondre à ces besoins, des entreprises spécialisées se forment. Par exemple, les musiciens de l'Orchestre symphonique de Toronto et de celui de Kitchener-Waterloo consacrent respectivement

4234 $ et 1586 $ par an à des articles dont ils ont besoin pour jouer.

Dépenses du public des arts : Les spectateurs qui assistent à des représentations ont toutes sortes de dépenses accessoires, notamment pour le transport, la nourriture, le logement, le gardiennage, le stationnement et l'achat de souvenirs. La nature de ces dépenses est précisée dans le rapport, tout comme leur importance, et les liens entre les arts et le tourisme y sont explorés.

IMPACTS DES RETOMBÉES

On a souvent dit, mais rarement prouvé, que les entreprises sont attirées par des endroits jouissant d'un environnement social de qualité, où l'on peut notamment trouver des possibilités artistiques et culturelles supérieures. Cette hypothèse est vérifiée par des examens détaillés de l'impact des festivals des arts de Blyth, d'Elora, de Niagara-on-the-Lake et de Stratford. Les auteurs démontrent comment ces festivals ont pu attirer et créer de nouvelles entreprises et de nouveaux emplois. En outre, l'activité économique accrue ne profite pas seulement aux établissements directement liés aux activités artistiques ou culturelles ou au tourisme, mais bien à tous les secteurs de l'économie.

ÉTUDES DE CAS

Les auteurs présentent des synopsis d'un certain nombre d'études économiques récentes sur les arts en Ontario. Certaines de ces études portent sur des manifestations précises, d'autres sur des activités artistiques dans des régions données. Quelle que soit l'approche, toutes les études soulignent l'importance économique des

activités artistiques pour les collectivités dans lesquelles elles ont lieu. Les cas suivants sont examinés : les expositions Totankhamon et Van Gogh, à l'Art Gallery en Ontario, les études des festivals de Stratford, de Blyth et d'Elora, du Festival Shaw et du Festival international de Toronto, celle des orchestres symphoniques de Toronto et de Kitchener-Waterloo et celle enfin des impacts des arts à Hamilton, Pembrooke, Kingston et Sudbury.

IMPACTS SOCIOCUTURELS

Afin de situer l'étude dans un plus large contexte et de compléter les analyses économiques, les auteurs ont brièvement exposé certains impacts socioculturels des arts.

APERÇU

À partir des statistiques du Conseil des arts du Canada, les auteurs brossent un tableau conservateur de l'impact économique de l'industrie des arts sur l'Ontario et sur le Canada. En 1983, il y avait en Ontario 107 769 emplois dans l'industrie des arts; le nombre d'emplois lié aux arts s'élevait à 182 160. Les recettes de l'industrie dans la province s'élevaient à 4,248 milliards de dollars, dont 1,446 milliard de dollars pour la rémunération et les salaires.

L'Ontario, qui compte 35,4 % de la population du Canada, aurait aussi, 46,0 % de l'activité artistique du pays. L'impact économique de l'industrie des arts dans la province s'élèverait à 6,797 milliards de dollars. La contribution de cette industrie ontarienne à l'économie nationale a été calculée à 8,920 milliards de dollars.

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ACKNOWLEDGEMENTS

This report has been prepared at the request of the Ontario Arts Council. We very much appreciate the opportunity to work upon this study and wish to thank Christopher Wootten, Ron Evans and Bob Sirman of the Arts Council for their help and encouragement. Elvio Del Zotto, who was also a member of the steering committee, provided valuable suggestions. We also appreciate the interest of Douglas Wright, President, University of Waterloo, in this study. Many individuals in government departments, arts organizations, and libraries provided valuable materials and suggestions, and although not mentioned by name, their contributions were invaluable. Linda Norton typed the manuscript with speed and efficiency. As is usual in such cases, while we are grateful for the help which we received, we do not wish to implicate others in our interpretations, and must shoulder responsibility for any errors or deficiencies which remain.

G. Wall
M. Purdon

DEFINITIONS OF SOME TERMS USED IN THIS REPORT

The Arts:

The arts supported by the Ontario Arts Council: Dance, Literature, Music, Theatre and the Visual Arts.

Arts Labour Force:

Those individuals using arts-related skills in their day-to-day jobs.

Arts Industry Labour Force:

Those individuals employed in the arts industries: advertising, broadcasting, motion pictures, publishing, performing and visual arts.

Arts-related Employment

Includes both the above categories, the Arts Labour Force and the Arts Industry Labour Force.

Experienced Arts Labour Force:

Individuals who worked in the arts within the previous five years.

From A Canadian Dictionary and Statistical Profile of Arts Employment, 1981, Canada Council Research and Evaluation (1984)

CONTENTS

SUMMARY.....1

INTRODUCTION.....6

MAGNITUDE OF THE ARTS SECTOR.....10

MAGNITUDE AND CHARACTERSTICS
OF THE ARTS CLIENTELE.....31

DIRECT IMPACTS.....47

INDIRECT IMPACTS.....61

INDUCED IMPACTS.....69

CASE STUDIES.....75

SOCIO-CULTURAL IMPACTS.....80

SUMMARY AND CONCLUSIONS.....82

BIBLIOGRAPHY.....88

SUMMARY

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Between 1971 and 1981, the arts labour force grew at a much faster rate than the total labour force, or the population. The total provincial labour force expanded by 33 per cent during this period, whereas Ontario's experienced arts labour force increased by 66 per cent, or 44,765 workers. The provincial arts industry labour force expanded by 53 per cent, or 36,105 workers during the same time.

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younger than the labour force as a whole.

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There has also been a considerable broadening of the audience base: significantly more people in Ontario attended plays and musicals (55 per cent), ballet and modern dance performances (23 per cent) and symphonic and other classical concerts (33 per cent) in the year 1983 than did in 1974. A 1983 survey indicated that 74 per cent of Ontarians reported that in the 12 months previous they had visited a library at least once, 56 per cent a museum or art gallery, 55 per cent a live play or musical, 52 per cent a presentation of arts and crafts, 33 per cent a classical music concert, 23 per cent a performance of ballet or modern dance and 13 per cent an opera or operetta.

The socio-demographic variables of education, income, age, occupation and gender are strongly related to arts presentation and three fundamental changes in the profile of the population--rising education, increasing participation of women, and the aging of the population--are interacting to affect change both in the nature of the economy and participation in the arts.

In the context of the rest of the country, Ontarians are both major producers and consumers in the arts industry. With attendance at performances of performing arts groups in Ontario totalling 6 million in 1985, audiences spent nearly $50 million on tickets. However, cost is a major factor affecting attendance, especially for young adults, females, those with lower incomes, and frequent par-

ticipants who would like to attend more.

DIRECT IMPACTS

In 1982-83, 27.7 per cent of governmental cultural expenditures in Ontario were made by the federal government, 36.2 per cent by the provincial government and 36.2 per cent by local government.

Federal government expenditures on culture constitute 0.4 per cent of its gross general expenditures. These expenditures rose to a peak in 1978-79, since when they have declined in real terms by 19.1 per cent.

The Ontario provincial government spent 0.5 per cent and municipal governments 1.8 per cent of their gross expenditures on culture. There has been a slight rise in both provincial and municipal financial support for culture in Ontario since the 1970s. Ontario is approximately average among provinces in these trends.

Private donations and other private support, including corporate fund-raising activities, are extremely important to the arts in Ontario. In 1984-85 private support was $2.707 million and constituted 14 per cent of the support received by the performing arts organizations in Ontario who were also funded by the Canada Council.

The Council for Business and the Arts in Canada reported that 65 of their members (54 per cent of their membership) made more than $71 million in corporate donations in Canada, of which 12.5 per cent was directed to arts and culture. The average annual arts donation per member is now approximately $140,000.

Galleries and museums depend less on private donations and more on government funding than performing arts organizations which are successful in attracting corporate donations.

Box office revenues are a prime source of income for arts organizations. For example, those professional arts organizations in Ontario funded by the Canada Council generated an earned income in excess of $47 million, of which 90.9 per cent was from box office receipts. Of their total revenue of almost $95 million, 55 per cent was earned, 30 per cent came from governmental sources and 14 per cent came from private donations. Such revenues constitute the incomes of arts organizations, and, in some cases, individual artists. They are injected into the Ontario economy when they are spent.

INDIRECT IMPACTS

The precise number of people employed in the arts and their associated incomes and expenditures vary with the definition of the arts and, in particular, whether one is concerned with the arts industry or arts labour force. Only a third of the arts labour force is actually employed in the arts industry. The total wages and salaries of the arts labour force in Ontario in 1981 exceeded $1.360 million. This money is disbursed

into the Ontario economy in much the same way as other Ontarians spend their money and, in this way it penetrates all sectors of the provincial economy.

Many artists make a variety of specific expenditures as a consequence of the practice of their art. Such requirements give rise to specialized businesses to cater to these needs. For example, Toronto and Kitchener-Waterloo Symphony musicians have individual annual expenditures of $4,234 and $1,586 respectively, on items associated with performing.

As a by-product of their attendance at arts events, members of the audience spend money on a wide variety of purchases, which may include transportation, food, accommodation, babysitting, parking fees and souvenirs. The nature and magnitude of these expenditures is illustrated by examples and the links between the arts and tourism are discussed.

INDUCED IMPACTS

It has been frequently stated, but seldom proved, that businesses are attracted to places with a high-quality environment, including the availability of superior artistic and cultural facilities. Such claims are documented through detailed investigations of the impacts of festivals at Blyth, Elora, Niagara-on-the-Lake and Stratford. The attraction and creation of new business and employment are demonstrated. Furthermore, the beneficiaries of the increased business are not confined to those establishments directly related to the artistic or cultural event, or tourism, but permeate all sectors of the economy.

CASE STUDIES

Synopses of a number of recent economic studies of the arts in Ontario are presented. Some of the studies are specific events, others are of artistic activities in particular regions but, whatever the approach, all of the studies draw attention to the economic significance of artistic activities to the communities in which they take place. The following situations are discussed: the Tutankhamun and Van Gogh exhibitions at the Art Gallery of Ontario; studies of the Stratford, Shaw, Blyth and Elora Festivals and the Toronto International Festival; the Toronto and Kitchener-Waterloo symphony orchestras; and the impacts of the arts in Hamilton, Pembroke, Kingston and Sudbury.

SOCIO-CULTURAL IMPACTS

In order to place the investigation in a broader context, and to complement the economic analyses, some socio-cultural impacts of the arts are discussed briefly.

SUMMARY AND CONCLUSIONS

A conservative overview of the economic impact of the arts industry on Ontario and Canada is presented through Canada Council statistics. In 1983, arts industry employment in Ontario was 107,769 and arts-

related employment was 182,160.

Arts industry revenue was $4,248 million, of which $1,446 million was spent on wages and salaries.

With 35.4 per cent of the national population, Ontario was estimated to have 46.0 per cent of the arts activity in the country. The provincial economic impact of the arts industry is indicated as being $6,797 million. The contribution of the Ontario arts industry to the national economy is calculated to be $8,920 million.

INTRODUCTION

The purpose of this report is to provide an economic perspective on professional arts activity in Ontario. In a narrow although conventional sense, it is an assessment of the contribution of the growth of arts activities to the economic progress of the province. In a broader sense it is the contribution of the growth of arts activities towards the development of a society (Thera and Brice, 1980, p. 1). We do not argue that an economic approach provides the only or even the best approach to evaluating the performance of the arts. In fact, we suggest that the arts are best assessed in artistic and cultural terms.

Nevertheless, we contend that an economic assessment of the arts in Ontario is one means by which the scope and significance of the arts to the province can be demonstrated.

The arts can be viewed as an industry or a series of interrelated industries. There are individuals and organizations who are producers, and consumers who purchase books, paintings, sculptures and crafts, and who attend performances and exhibitions. These activities generate employment and involve a multitude of financial transactions. Many of these exchanges take place between people domiciled in the province but others, as in the case of tourists who patronize artistic activities in Ontario, draw in money from elsewhere. Furthermore, individuals and artistic organizations spend money in a diversity of ways as they go about their day-to-day affairs and arts consumers make expenditures as a by-product of their patronage of artistic activities. The volume, diversity and implications of these financial transactions, and the associated employment, are the concerns of this document.

DEFINITIONS OF TERMS

Definitions of the arts and culture vary considerably. However, the mandate of the Ontario Arts Council provides the framework within which the arts and culture are viewed in this report. Under the legislated mandate of the Ontario Arts Council, the arts are defined as follows:

> "the arts of the theatre, literature, music, painting, sculpture, architecture or the graphics arts, and includes any other similar creative or interpretive activity" (Ontario Arts Council, 1985, p. 1).

Slack (1980) adopted a slightly different categorization, with some exclusions from the above list. Chartrand (1984) suggested a very different definition and, in fact, the number of different definitions is almost as great as the number of authors writing upon the topic. In addition, it is common for researchers to examine subsets of the arts, such as the performing arts, the visual arts,

the fine arts or the commercial arts and these, too, may be defined in different ways. There is no doubt that the available data have been collected on the basis of many different definitions so that statistics are difficult to compare from one report to another and assumptions must be clarified if the data are to be used. The inconsistent data make it difficult to derive a definitive statement on the impacts of the arts, yet it is essential to employ data from a diversity of sources if different types of impacts are to be documented. However, while many different, and sometimes inconsistent sources of data are incorporated in this report, the responsibilities of the Ontario Arts Council are employed as a standard and point of departure.

ECONOMIC IMPACTS

Economic impacts are usually measured in monetary units (dollars) and employment. Both of these measures will be employed in this study. No attempt will be made to impute a dollar value to the artistic experience (sometimes called primary benefits) through such techniques as willingness-to-pay or the calculation of consumer surplus. Primary benefits are those benefits accrued by audiences as a result of their arts experiences. Such benefits are usually described qualitatively (Wall and Brown, 1983). Their evaluation is outside the terms of reference for this study although they will be touched upon in the section on socio-cultural impacts. This orientation reflects the terms of reference and does not imply a belief that the arts are important primarily for their contribution to the economy.

The main focus of this investigation is upon economic impacts or secondary benefits. Economic impact is the "total direct, indirect and induced benefit realized within some geographical region as a consequence of a (given) expenditure." (Econalysis, 1984, p. 5). Secondary benefits have been defined as "direct, indirect or induced benefits accrued by the community." They are usually referred to as the economic impact on a locale's or region's economy (Wall and Brown, 1983). Again, Chartrand (1984) has adopted somewhat different definitions. The specific components of secondary benefits and economic impact will be discussed in more detail in their respective sections.

Some authors, particularly those employing multiplier analyses, would confine their attention to the implications of expenditures originating outside of the study area, in this case Ontario. However, such an approach would overlook the considerable artistic production for consumption by residents of the province. This report adopts a broader approach and considers artistic production for "domestic" consumption as well as that for "export": in practice it is extremely difficult to separate the two. This investigation will not examine all of the costs involved in the presentation of the arts. In

particular, no attempt will be made to assess the capital locked up in galleries, theatres or centres for the performing arts (many of which are multipurpose) or their replacement value. Similarly, opportunity costs will not be examined. Rather, it is assumed that some level of provision for the arts has occurred and will continue to occur on the basis of their intrinsic value and that an economic assessment of the arts provides a supplementary argument for such provision.

DATA SOURCES AND THEIR IMPLICATIONS

There is a substantial and growing literature concerned with economic aspects of the arts in Canada, as well as a variety of international sources. The data for this report are derived primarily from published documents supplemented by data gathered from personal and telephone interviews with key personnel in government and the arts.

Computer literature searches were undertaken and libraries were consulted in Toronto, Ottawa and Waterloo. Data and reports were made available by such organizations as the Ontario Arts Council, the Ontario Ministry of Citizenship and Culture, the Ontario Ministry of Tourism and Recreation, Statistics Canada, the Canada Council, Tourism Canada, the federal Department of Communications and the Council for Business and the Arts in Canada.

However, as pointed out earlier, the adoption of different definitions, coupled with different dates of assessment and publication, frustrate the integration of much of the data in these reports. There is a considerable body of information available at the national level. Much of this emanates from the Canada Council, Statistics Canada and the Department of Communications. This information is particularly useful in presenting a national perspective which permits comparison of Ontario with other provinces on such matters as funding and employment. However, the most recent census data which are available were collected in 1980-81 so that some of the materials are dated. While it is possible to glean provincial statistics from the above sources, there have been few attempts to provide a provincial assessment of the impacts of the arts on the Ontario economy. Book (1972) provided a now out-dated assessment on the basis of a survey of selected arts organizations and Audley (1983) also has made an investigation of the cultural industries of Canada.

The Policy Planning Secretariat of the Ontario Ministry of Citizenship and Culture published a resource guide in 1985. However, perhaps the most comprehensive evaluations of the economic impacts of the arts in Ontario are the unpublished and now dated paper by Slack (1980) and the fact sheet prepared by Chartrand (1985). A brief summary statement has been prepared by the Canada Council (1986) as part of a larger document and this is the subject of a section later in this report.

In recent years there has been a variety of studies which have investigated specific arts activities in specific locations in the province. Such studies examine economic impacts of the arts, such as the ability of artistic events to attract new business to communities, which have not been tackled at the national or provincial levels. Unfortunately such studies are not additive: one cannot cumulate their findings or use them to assess the provincial magnitude of such impacts. Nevertheless, they are useful and will be drawn upon to illustrate the kinds of impacts of the arts which are taking place and may be expected in Ontario's communities. The remainder of this report presents the findings of the study under the following headings:

The Magnitude of the Arts Sector

The Magnitude and Characteristics of the Arts Clientele

Direct Impacts

Indirect Impacts

Induced Impacts

Case Studies

Socio-cultural Impacts

Summary and Conclusions

MAGNITUDE OF THE ARTS SECTOR

> "In terms of access to the arts and opportunities to participate in them, Ontario is second to no other jurisdictions in the world" (Bill Davis in Ontario Arts Council Annual Report, 1982-1983, p.4).

It is possible to consider magnitude from a number of perspectives. Within this section, magnitude will be discussed with reference to:

1. the arts, yesterday and today: breadth and diversity
2. the arts, Ontario and Canada
3. the arts and other sectors of the economy
4. the arts labour force and employment

THE ARTS, YESTERDAY AND TODAY: BREADTH AND DIVERSITY

It should not be surprising, perhaps, that the province which is home to 35.4 per cent of the nation's population is also distinguished for the breadth and diversity of its cultural activity. Artistic activity has always concentrated in the cities, for it is the cities, as Chartrand notes, which "provide the necessary concentration of population required to support an integrated network of cultural facilities, pools of artistic talent and a wide spectrum of audiences" (Chartrand, 1986, p. 2). Indeed, as early as the 1950's and 1960's, when Ontario laid claim to the greatest concentration of professional artists and arts organizations in English-speaking Canada, it was the province's capital, Toronto, which formed the hub of this activity.

The city was acknowledged as the "culture capital" of the English communications industries: television, radio, book and magazine publishing. It remains thus today.

The contemporary cultural landscape in Ontario, however, bears scant resemblance to that which existed two decades ago. While Toronto in 1981 accounted for some 40 per cent of all arts activity in the province with revenues of at least $1.4 billion, the provincial capital is now, unlike the early sixties, buttressed by the emergence of regional centres of excellence, geographically widely distributed: Thunder Bay and Sudbury in the North, Kingston in the East, Hamilton, Kitchener-Waterloo and London in the South-West. The city of Ottawa, which Chartrand merges with Hull to form part of a second tier of metropolitan areas in the country, is itself a centre of excellence with revenues from arts industry activity in 1983 of over $3.0 million representing 10 per cent of all industry activity in the province (Hillman-Chartrand, 1985).

Similarly, while Toronto is among the three largest production centres of live theatre in North America, there are now companies in Barrie, Blyth, Sudbury, Peterborough and Thunder Bay (MacSkimming, 1983). While Toronto is home to performing arts institutions of international stature (the Canadian Opera Company,

National Ballet and Toronto Symphony Orchestra), both the Shaw and Stratford Festivals in Niargara-on-the-Lake and Stratford respectively, share international reputations. The picture today, then, no longer resembles that which the Ontario Arts Council described in 1963 in its survey of arts resources in the province:

> "there is not a single professional theatre in all of Eastern or Northern Ontario. There is only one community orchestra of an amateur level in Eastern Ontario and only one symphony orchestra of any quality anywhere in Ontario outside of Toronto. The same thing applies to professional choirs." (MacSkimming, 1983, p. 24)

The impact of the arts on these smaller urban centres will be discussed through an examination of case studies in a later part of this report. Suffice to say that while it may be difficult to determine the exact impact of OAC policy and funding on the growth and spread of the Arts, expansion has occurred. Through support of touring, artists in schools, contact with arts councils and the like, the OAC has indicated its commitment to meeting the artistic needs of all Ontarians.

While the last two decades have been characterized by expansion with reference to the spatial distribution of the arts and increased accessibility in communities outside of Toronto to arts opportunities, the time period has been similarly marked by a growth in the diversity and number of arts organizations. This may best be demonstrated through historical reference.

In 1963, the fledgling Ontario Arts Council conducted an inventory of the province's artistic resources. The following list highlights what the Council found in existence:

> "one classical theatre (the Stratford Festival); one professional repertory theatre (the Crest); two professional touring theatre groups (the Canadian Players and the Crest Tour Company); one classical ballet company (the National Ballet of Canada); one fully professional symphony orchestra (the Toronto Symphony); one touring chamber orchestra (the Hart House Orchestra); two public art galleries with extensive collections (Art Gallery of Toronto... and the National Gallery of Canada in Ottawa) and five public galleries with limited collections." (MacSkimming, 1983, p. 10)

Today, Ontario is home to two-thirds of the country's symphony orchestras. The OAC assists annually some thirty orchestras, a dozen chamber ensembles, as well as the Canadian Opera Company and Canadian Opera Company ensemble. In 1963, the OAC was only able to fund 6 theatrical groups of any professional standing.

In 1985-86, the Council, through its theatre office, assisted 23 organizations as well as 14 regional and summer theatres with their on

going operations and gave support to some 34 projects of a one-time nature. In addition, the Council gave assistance to 101 playwrights for the development of new scripts (OAC Annual Report, 1985-1986). Today the province boasts a broad spectrum of theatre from the classical festival theatres of Stratford and Shaw to the experimental and developmental theatres specializing in original works. In literature, the OAC has supported extraordinary growth. Recipients of block grants (book publishers) grew from 5 in 1972 to over 50 in 1983; grants to periodicals from 7 in 1971 to over 50 in 1983 (MacSkimming, 1983). About 98 per cent of all English-language publication is based in Ontario with Toronto as the principal centre for book publishing. With respect to dance, in the mid-sixties the National Ballet of Canada was the only professional dance company that the OAC could support. Today, Council extends support to classical, experimental and modern dance troupes, professional training programs, choreographic workshops and the like. In 1984-85, 14 companies received assistance targetted towards operations and projects; 18 individuals received choreography awards and 5 organizations in the mime and puppetry area were given funding.

There has been growth, also, in the number of artists and organizations servicing the Franco-Ontarian communities. In 1970,the OAC received 6 applications for assistance. In 1983, the Council assisted 40 organizations and 70 individual artists. The Council has also been active in the provision of assistance to community arts festivals, native arts groups and folk arts councils; in the support of entertainment series and artists/companies on tour in communities and schools; in the support of film-making, video production, photography and sound recording;in assistance to the range of visual, literary and performing artists. The magnitude of the sector is only partially evident in the diversity in artists and organizations represented in the Annual Reports of the Ontario Arts Council or the Canada Council. Yet some idea of the breadth and diversity of the Arts sector may be gleaned from such reports. In 1985-86, the OAC processed over 3,000 grants across some 90 granting programs for expenditures in grants of $21,000,000 and in programs of $889,000. Over the same time period, the Canada Council processed some 1,281 grants in Ontario with a total value of $17.981 million. Twenty nine per cent of Canada Council grants were distributed to Ontario in 1985-86 (Research and Evaluation, Canada Council, 1987). With respect to breadth, in the year 1982-83, 75 per cent of OAC grants were distributed to individuals or groups outside of Metro Toronto. The 250 communities who received Council assistance represented 80 per cent of the 312 cities, boroughs, towns and villages recorded in the Ontario Municipal Directory (OAC Annual Report, 1982-1983). It is difficult, in light of the historical perspective, not to acknowledge both the breadth and diversity of the Arts in Ontario.

THE ARTS, ONTARIO AND CANADA

The magnitude of the Arts sector in Ontario may also be gauged through a comparison of the Arts in Ontario with the Arts in the rest of Canada. Obviously, comparisons could be made along a number of dimensions: employment, regional distribution, revenues, salaries, expenditures or growth to mention a few. While employment will be mentioned in this section, it will be discussed more fully later in the report. The focus of this section is the regional distribution of the arts. Reference will be made to economic dimensions of selected cultural activities as well.

EMPLOYMENT

In 1981, arts-related employment was nearly as large as employment in the agricultural labour force or total federal government employment excluding crown corporations (Chartrand, 1985). Ontario accounted for 44 per cent or 182,160 of all arts-related-jobs in 1981. Arts-related employment includes two populations: the arts labour force and the arts industry labour force. The arts labour force is defined as those individuals using arts-related skills in their day-to-day jobs. Based on 1981 data, Ontario accounted for 42 per cent of the 278,255 workers in the Canadian arts labour force or 116,867 jobs in 1981. The arts labour force in Ontario increased 65 per cent between 1971 and 1981 as contrasted with a growth of 33 per cent in the entire labour force over the same time period. The arts industry labour force is made up of workers employed in the arts industries: advertising, broadcasting, motion pictures, publishing, performing and the visual arts. Again using 1981 definitions, Ontario accounted for 46 per cent of the 234,280 workers in the Canadian arts industry labour force or 107,769 jobs. Together, the arts labour force and the arts industry labour force constitute arts related employment, a sector of 414,000 workers, 4 per cent of the Canadian labour force in 1981 (Chartrand, 1985).

Broken down by type of artist, almost half of the country's visual artists live in Ontario (Culture Statistics, 1979) as do over 50 per cent of actors and actresses (Culture Statistics, 1981) and musicians (Culture Statistics, 1982). The province is home, also, to 44 per cent of dancers and choreographers (Statistics Canada, 1985) and almost 50 per cent of all full time freelance writers (Harrison, 1982).

REGIONAL DISTRIBUTION AND ECONOMIC DIMENSIONS

With respect to the cultural industries, Ontario is the centre for between 75 per cent and 90 per cent of all English-language production in Canadian books, feature films, sound recordings and television drama (Special Committee for the Arts, 1984).

Table 1 on the economic dimensions of selected cultural activities, 1982 highlights the magnitude of these and other cultural activities

TABLE 1: Economic Dimensions of Selected Cultural Activities in Ontario, 1982

	Number of Companies	Income/ Revenue ($M)	Expenses ($M)	Salaries ($M)	Employment
MEDIA					
Broadcasting	249	618.44	459.25	188.3	8037
Film Laboratories	60	48.74	39.12	13.85	607
Film Production	257	111.97	109.08	19.84	1063
Film Distribution	63	204.61	185.12	13.73	555
Movie Theatres	380	175.26	144.9	35.21	5686
Record Production	65	239.47	219.94	33	1849
Total	1074	1,398.49	1157.41	303.93	17797
VISUAL ARTS					
Public Art Galleries	50	41.25	39.87	14.12	875
Artists	--	11.18	10.9	0.28	1414
Total	50	52.43	50.77	14.4	2289
LITERARY ARTS					
Book Agents	22	85.81	81.36	13.41	635
Book Publishers	94	519.79	461.73	88.75	4282
Writers	--	14.22	--	14.22	1185
Public Libraries	559	192.35	192.15	107.78	5608
Total	675	812.17	735.24	224.16	11710
PERFORMING ARTS					
Artists	--	165.57	23.13	142.44	16740
Companies	88	70.96	71.38	45.26	
Total	88	236.53	94.51	187.7	16740
Province Total	1887	2,499.62	2037.93	730.19	48536

Source: Statistics Canada Tabulations: Selected Culture Statistics in Economic Impact Study, Steering Committee, September, 1985.

TABLE 2: Economic Dimensions of the Culture Sector (Performing Arts), Ontario (1984-85)

Category	Music (Non-profit professional companies)	Dance	Theatre	Total All Companies
DIMENSION				
# Establishments	76.00	19	49	144
# Spectators	2,515.00	882	2747	6144
PERSONNEL				
F. T. Jobs (E)	300.00	400	2225	2925
P. T. Jobs (E)	1,750.00	325	1925	4000
Volunteers	7,616.00	481	2430	10527
Total Employees (E)	2,050.00	725	4150	6925
OPERATING REVENUES				
Earned Revenues	15.61	4.865	27.381	47.857
Federal Grants	3.75	4.056	4.111	11.916
Provincial Grants	4.40	1.665	4.464	10.526
Local Grants	2.74	0.836	2.035	5.61
Private Donations	7.86	2.078	4.615	14.549
Total (2)	34.35	13.5	42.606	90.458
EXPENDITURES				
Personnel (E)	23.77	7.717	22.442	53.928
Other Operating	12.80	6.313	22.442	41.552
Total Operating	36.57	14.03	44.884	95.48
Capital		0	0	0
Total Expenditures	36.57	14.03	44.884	95.48
Deficit	-1.257	-0.257	-0.430	-1.944
Accumulated Deficit	-4.782	-1.490	-6.892	-13.164

Source: Report of the Steering Committee on the Economic Dimensions of the Culture Sector, August, 1986

with reference to number, revenue, expenses, salaries and employment.

In the media arts, a total of 1,074 companies employed 17,979 people generating revenues of $1,398 million. Ontario and Quebec accounted for 56 per cent and 30 per cent or, in total, 86 per cent of companies nationwide. In a 1983 survey of the recording industry, 68 or 63 per cent of the 108 companies surveyed were based in Ontario. Quebec was home for 24 or 22 per cent with 11 or 10 per cent of the companies located in the remaining provinces (Statistics Canada, 1985). Figures for broadcasting understate the magnitude of that sector in Ontario as the data do not reflect CBC expenditures and employment.

In 1981/82, the CBC employed over 17,000 people in Ontario (15,000-16,000 in Quebec) and spent $180.5 millions for salaries and contracts. Roughly 20 to 25 per cent of CBC expenditures may be targetted as going directly to the arts (Economic Impact Steering Study Committee, 1985). Toronto is the principal centre for book publishing (English). In 1982 there were 94 publishers in the province employing 4,282 people. By comparison, the second largest book publishing province, Quebec, housed 71 companies which provided employment for 1,059 people. The two provinces together accounted for more than 90 per cent of all titles published and reprinted in 1983 (Statistics Canada, 1985). In the visual arts, there were 50 public galleries in Ontario in 1982, a source of employment for 2,289 people. The comparable figures for Quebec were 20 (galleries) and 679 (employed).

Disregarding data on heritage and, for the moment, on the performing arts as this component will be discussed forthwith, the media, visual and literary arts, in 1982, numbered 1,799 companies or organizations and provided employment for 31,978. The figure on employment may not reflect, totally, employment in 1982 as the visual artist data are for 1977 and the figures for writers for 1978. All figures in Table 2 reflect Statistics Canada data reported by the Economic Impact Study Steering Committee, 1985. In the performing arts, Ontario is home for about 32 per cent of the groups and accounts for 45 per cent of the audience nationwide.

The regional distribution of the performing arts changed in favour of British Columbia and, especially, Ontario during the 1970's. Both provinces experienced increases in the number of companies as well as their relative shares of total expenditures, performances and spectators (Chartrand, 1984). Table 2 summarizes the economic dimensions of the culture sector in Ontario by type of performing art: music, dance or theatre. As recorded in the Table, in 1985 there were over six million people in attendance at performances of the 144 non-profit professional companies examined. This audience spent more than 50 million dollars on tickets alone. The 144 companies supplied almost 7,000 jobs. Expenditures on personnel amounted to 55

TABLE 3: Economic Dimensions of the Culture Sector (Performing Arts), Ontario (1985-86)

Category	Music (Non-profit professional companies)	Dance (Non-profit professional companies)	Theatre (Non-profit professional companies)	Total All Companies
DIMENSION				
# Establishments	42%	31%	23%	32%
# Spectators	60%	46%	36%	45%
PERSONNEL				
F. T. Jobs (E)	25%	52%	57%	50%
P. T. Jobs (E)	24%	28%	25%	25%
Volunteers	91%	41%	55%	76%
Total Employees (E)	24%	37%	35%	31%
OPERATING REVENUES				
Earned Revenues	39%	43%	50%	45%
Federal Grants	32%	48%	27%	34%
Provincial Grants	34%	41%	29%	33%
Local Grants	56%	57%	50%	54%
Private Donations	48%	50%	49%	48%
Total (2)	41%	47%	44%	43%
EXPENDITURES				
Personnel (E)	41%	47%	44%	43%
Other Operating	40%	46%	44%	43%
Total Operating	41%	47%	44%	43%
Capital				
Total Expenditures	41%	46%	47%	42%
Deficit	42%	-193%	23%	29%
Accumulated Deficit	60%	65%	66%	63%

Source: Report of the Steering Committee on the Economic Dimensions of the Culture Sector, August, 1986

TABLE 4: Comparative Size of the Arts Industry Relative to Manufacturing Industry, 1982

	Number of Establishments	Revenue in Millions of Current Dollars	Staff	Salaries & Wages in Millions of Current Dollars
Food and Beverages	4,372	32,930	226,946	4,687
Tobacco Products	24	1,494	8,711	222
Rubber/Plastic Products	1,036	4,434	57,076	1,147
Leather Products	419	1,106	22,957	330
Textiles	989	4,508	59,416	1,045
Knitting Mills	255	948	18,318	254
Clothing	2,107	3,962	91,306	1,214
Wood	3,353	7,173	97,125	2,104
Furniture & Fixtures	2,489	2,494	47,289	752
Paper & Allied	773	14,784	122,763	3,282
Printing/Publishing and Allied	4,620	6,779	106,588	2,280
Primary Metal	446	12,402	113,215	3,168
Metal Fabricating	5,150	11,766	141,563	3,102
Machinery	1,679	7,662	95,909	2,220
Transportation Equipment	1,202	22,657	161,086	3,980
Electrical Products	1,116	8,714	117,377	2,544
Non-metallic Mineral Products	1,535	4,385	47,949	1,135
Petroleum & Coal Products	125	21,709	21,501	767
Chemical & Chemical Products	1,221	14,095	88,036	2,296
Misc. Manufacturing	2,923	3,930	63,719	1,165
All Industries	35,834	187,932	1,708,850	37,695
Arts Industry	17,515	8,481	134,275	2,841
Rank		9th	4th	6th

Note: All industry data from Manufacturing Industries of Canada, Statistics Canada Cat. 31-203

per cent of overall operating expenditures of roughly 95 million. Total revenues of approximately $94 million included $5.6 million from local governments, $10.5 million from the province,almost $12.0 million in federal support and $14.5 million in private donations. The companies were in deficit of $1.4 million but had an accumulated deficit of almost $13.2 million.

Table 3 expresses the same economic dimensions in percentage terms providing a perspective on Ontario vis-a-vis the country as a whole.

Seen in relation to the rest of the country, the province represents nearly half the total revenue for all dance and theatre groups and 40 per cent of revenues of music groups.

Ontario accounts for over 50 per cent of local government grants and 48 per cent of private donations to the performing arts. On a per capita basis, federal and provincial support to this sector matches the norms for the country. Earned revenue, local government and private support, however are 30 per cent to 50 per cent above the norm. Total income is about 20 per cent higher than would be expected on a per capita basis. In dexing the figures as a proportion of Ontario's share of the gross domestic product rather than on a per capita basis, yields somewhat different (GDP) results. Related to GDP, federal and provincial grants are lower than national norms (about 10 per cent) while other income parameters remain about the same (Economic Dimensions of the Cultural Sector, 1986). On a less positive note, companies in Ontario hold 63 per cent of the accumulated deficit.

The figures reported in Tables 2 and 3 were part of the Report of the Steering Committee on the Economic Dimensions of the Culture Sector (1986). It should be noted that while the Tables report capital expenditures as zero, the province of Ontario in 1981 was recorded as having 22 per cent of all performing arts facilities nationwide and 28 per cent of all available seats. These facilities have an estimated worth in the hundreds of millions of dollars (Chartrand, 1985).

THE ARTS AND OTHER SECTORS OF THE ECONOMY

The Arts industry includes advertising, broadcasting, motion pictures, the performing and visual arts and publishing, which includes libraries, sound and video recording. A comparison of the country's entire arts industry to the 20 largest Canadian manufacturing industries places the arts industry 9th in revenue in 1982, 4th in number of staff employed and 6th in expenditures on wages and salaries (Research and Evaluation, Canada Council,1985). The exact figures are reported in Table 4. The direct impact of the total arts and culture sector as measured by the GDP was valued in 1981 at $5.2 billion or 1.7 per cent of the whole economy. In comparison to other industries, the direct impact of the arts and culture sector is somewhat larger than

TABLE 5: Experienced Arts Labour Force by sex and occupation, Ontario, 1981

Occupation	Experienced Arts Labour Force	Male	Female
Total Labour Force	4,420,005	2,569,355	1,850,655
Arts Labour Force	114,060	67,030	47,020
% of Total Labour Force	3%	3%	3%
Architects & Engineers			
Architects	2,495	2,320	175
Library/Museum/Archival Sciences	8,805	2,045	6,760
Supervisors	795	285	510
Librarians and Archivists	6,110	1,110	5,000
Technicians	885	375	505
Other n.e.c.	830	210	625
Unassigned	185	65	120
Other Teaching/Related Occupations			
Fine Arts Teachers, n.e.c	7,560	2,225	5,330
Artistic/Literary/Performing & Related	55,315	33,145	22,170
Fine & Comm. Art/Photography/Related	23,555	13,360	10,205
Painters/Sculptors/Related	2,965	1,570	1,395
Product/Intereior Designers	7,745	3,250	4,495
Advertising/Illustrating Artists	8,450	5,225	3,230
Photographers/Cameramen	3,585	2,865	725
Other n.e.c.	260	155	105
Unassigned	550	295	255
Performing & Audio-Visual Artists	15,735	11,115	4,610
Producers & Directors	3,565	2,530	1,035
Conductors/Composer/Arrangers	515	415	100
Musicians/Singers	5,295	3,860	1,430
Related Music/Entertainers, n.e.c.	385	325	60
Dancers/Choreographers	515	90	425
Actors/Actresses	1,155	690	465
Radio/Television Announcers	1,910	1,580	330
Other n.e.c.	1,825	1,275	550
Unassigned	570	350	215
Writing	16,030	8,675	7,355
Writers/Editors	13,215	7,575	5,645
Translators/Interpreters	2,265	835	1,430
Other n.e.c.	165	55	105
Unassigned	385	210	175
Printing & Related	32,372	22,010	10,195
Foremen	3,202	2,555	470
Typesetting/Composing	3,945	2,210	1,740
Printing Press	9,865	8,680	1,185
Stereotyping/Electrotyping	40	35	5
Printing/Engraving-Except Photoengraving	1,560	1,400	160
Photoengraving & Related	1,255	1,055	200
Bookbinding & Related	4,405	1,325	3,085
Labouring/Elemental Work/Related	1,460	985	475
Other n.e.c.	5,485	3,100	2,385
Unassigned	1,155	665	490
Electronic & Related Comm. Equip. n.e.c.	3,390	2,850	540
Foremen	445	375	70
Radio/TV Equipment Operators	1,435	1,190	245
Sound/Video Recording/Reproduction	635	500	130
Motion Picture Projectionists	555	510	50
Other n.e.c.	110	85	30
Unassigned	210	190	15
Other Crafts & Equipment Operating	4,290	2,430	1,855
Foremen	505	390	115
Photographic Processing	3,535	1,935	1,600
Other n.e.c.	105	35	70
Unassigned	145	70	70

Source: Statistics Canada
Experienced Arts Labour Force (occupation is based on the 1980 classification and industry is based on the 1970 classification)

Note: Figures may not add due to rounding.

the tobacco, rubber, textile, clothing, furniture and fixture industries and about the same as the metal and mines, food and beverage, electrical power, gas and other utilities and the accommodation and food services industries (Statistics Canada, 1986).

It is clear from the aforementioned discussion that the arts and culture make a substantial contribution to the country's economy, an impact which compares favourably with that of other industries more frequently discussed in economic terms. Data for a similar comparison at the provincial level are not readily available. While it is difficult to predict the extent to which the provincial pattern matches the federal, it is to be remembered that the province dominates both in the magnitude of its manufacturing sector and in the size of its arts and culture sector. It should be remembered, however, that each component of arts and cultural activity (for example, performing arts) would be much smaller than each individual manufacturing activity (Slack, 1980).

THE ARTS LABOUR FORCE AND EMPLOYMENT

In this section of the report, dimensions of arts employment will be explored as follows:

1. magnitude of the arts labour force and arts industry
2. growth in arts employment, 1971-1981
3. profile of the arts labour force by gender, education, occupation, geographic distribution
4. income of artists

Discussion is based primarily on 1981 Census data, the most recent census for which complete statistical summaries are available. The definition of terms "experienced arts labour force" and "arts industry labour force" is that found in "A Canadian Dictionary and Statistical Profile of Arts Employment,1981," henceforth referred to as the Profile.

MAGNITUDE OF THE ARTS LABOUR FORCE AND ARTS INDUSTRY

Ontario comprises 37 per cent of the total national labour force; 4.42 million workers of a national labour force in 1981 of approximately 11.8 million. The experienced arts labour force in Ontario numbered 114,060 workers in 1981; 3% of the total Ontario labour force and 41 per cent of the national arts labour force (Policy Planning Secretariat, 1985). Roughly 35 per cent of the arts labour force were employed in the arts industry in 1981. Within the overall arts industry, Ontario accounted for 46 per cent of the 234,280 workers in Canada or 107,769 jobs.

Chartrand estimates Ontario's contribution to the national labour force at 42 per cent based on a provincial arts labour force of 116,877.

Summarizing employment within the two populations, in 1981 Ontario accounted for 44 per cent or 182,160 of all arts related jobs in Canada (Chartrand, 1985). Table 5 provides a breakdown of the

TABLE 6: Growth in Experienced Arts Labour Force by Occupation, Ontario 1971 to 1981

Occupation	1971 Census	1981 Census	Difference	% Change
Total Labour Force	3,410,830	4,548,410	1,137,580	33%
Arts Labour Force	67,975	112,470	44,495	65%
% of Total Labour Force	2%	2%	4%	197
Architects and Engineers				
Architects	1,505	2,240	735	49%
Library/Museum/Archival Sciences	4,000	8,770	4,770	119%
Supervisors	485	920	435	90%
Librarians and Archivists	2,890	6,090	3,200	111%
Technicians	490	885	395	81%
Other n.e.c.	135	875	740	548%
Other Teaching/Related Occupations				
Fine Arts Teachers, n.e.c	5,565	7,645	2,080	37%
Artistic/Literary/Performing & Related	28,150	54,835	26,685	95%
Fine & Comm. Art/Photography/Related	12,495	23,430	10,935	88%
Painters/Sculptors/Related	870	3,010	2,140	246%
Product/Intereior Designers	4,980	7,790	2,810	56%
Advertising/Illustrating Artists	4,215	8,710	4,495	107%
Photographers/Cameramen	2,255	3,630	1,375	61%
Other n.e.c.	170	290	120	71%
Performing & Audio-Visual Artists	7,595	15,685	8,090	107%
Producers & Directors	1,575	3,835	2,260	143%
Musicians/Singers	3,830	6,235	2,405	63%
Related Music/Entertainers, n.e.c.	145	520	375	259%
Actors/Actresses	440	1,200	760	173%
Radio/Television Announcers	840	1,915	1,075	128%
Other n.e.c.	765	1,980	1,215	159%
Writing	8,070	15,720	7,650	95%
Writers/Editors	7,075	13,160	6,085	86%
Translators/Interpreters	900	2,285	1,385	154%
Other n.e.c.	95	275	180	189%
Printing & Related	23,985	31,850	7,865	33%
Foremen	3,380	3,545	165	5%
Typesetting/Composing	5,405	5,300	-105	-2%
Printing Press	5,725	8,555	2,830	49%
Stereotyping/Electrotyping	170	40	-130	-76%
Printing/Engraving-Except Photoengraving	1,575	1,600	25	2%
Photoengraving & Related	745	1,225	480	64%
Bookbinding & Related	3,080	4,565	1,485	48%
Labouring/Elemental Work/Related	820	1,470	650	79%
Other n.e.c.	3,085	5,550	2,465	80%
Electronic & Related Comm. Equip. n.e.c.	2,245	3,155	910	41%
Foremen	425	445	20	5%
Radio/TV Equipment Operators	1,140	1,540	400	35%
Sound/Video Recording/Reproduction	150	490	340	227%
Motion Picture Projectionists	485	570	85	18%
Other n.e.c.	45	110	65	144%
Other Crafts & Equipment Operating	2,535	4,250	1,715	68%
Foremen	350	570	220	63%
Photographic Processing	2,115	3,565	1,450	69%
Other n.e.c.	70	115	45	64%

Source: Statistics Canada
Experienced Arts Labour Force (occupation is based on the 1980 classification and industry is based on the 1970 classification)

experienced arts labour force by gender and occupation using a nine sector typology. Of the total labour force of 114,060, 48 per cent or 55,315 people were defined as employed in the artistic, literary, performing arts and related occupations.

GROWTH

Between 1971 and 1981, the arts labour force grew at a much faster rate nationally (74%) than the total labour force (39%) or the population as a whole (13%) (Statistics Canada, 1985). The number of artists increased 102% from 65,445 in 1971 to 131,930 (Chartrand, 1984). Over the same time period, Ontario's experienced arts labour force expanded by 66 per cent or 44,765 workers. The comparable growth figure for the total provincial labour force was 33 per cent. Arts labour force growth in the province was twice as great as the growth rate of the total labour force. The provincial arts industry labour force, as distinct from the experienced arts labour force, expanded by 53 per cent or 36,105 workers from 1971 to 1981. Comparatively, growth across all industries in the province was 33 per cent over the same duration. In other words, arts industry growth was 1.49 times as great as the growth rate of all industries (Policy Planning Secretariat, 1985). Table 6 highlights the growth in the experienced arts labour force in Ontario, 1971 to 1981. The percentage change in arts labour force growth in the province across all occupations was generally less than that recorded nationally with the exception of teaching and other related occupations. Within specific occupations, at the provincial level the greatest growth occurred in the library, museum and archival sciences (119 per cent or a difference of 4,765 workers) and in the performing and audio-visual arts (107 per cent or a difference of 8,095 workers). The least growth was experienced in printing and related occupations (33 per cent) and in teaching and related occupations (37 per cent). Within the arts industry as distinct from the arts labour force,provincial growth also tended to be less than the percentage increase in growth in the arts industry labour force nationally(Table 7). The significant exception was employment in motion picture production and distribution where the province experienced growth over ten years of 103 per cent as compared with growth nationally of 85 per cent. Within specific occupations,at the provincial level greatest increases in employment were in occupations subsumed by the categories theatrical and other staged entertainment (131 per cent or an increase of 4,935 workers), book and stationery stores (104 per cent or 3,495 workers), and motion picture production and distribution (103 per cent or 2,040 workers).

The least growth was recorded in employment related to publishing and printing where a decline of 2 per cent or 445 workers was evidenced.

TABLE 7: Growth by Arts Industry Experienced Arts Labour Force, 1971 - 1981

Arts Industry	CANADA National % Growth Total	M	F	ONTARIO Provincial % Growth Total	M	F
All Industry	39	26	64	33	21	56
Arts Industry	58	37	91	53	33	80
% of all Industries	149	142	142	160	161	143
Publishing Only	110	71	152	96	76	111
Publishing & Printing	1	21	57	-2	-23	44
Radio & TV Broadcasting	85	72	118	78	65	109
Book & Stationary Stores	110	61	135	104	69	126
School of Fine Art and Performing Arts	30	29	32	21	14	24
Libraries, Museums and Other Repositories	87	80	91	68	62	70
Motion Picture Theatres	17	14	21	17	11	139
Motion Picture Producers and Distributors	85	67	122	103	81	174
Theatrical & Other Staged Entertainment	127	111	178	131	114	174
Advertising Services	81	53	128	82	52	126
Offices of Architects	99	82	170	62	51	115

Source: Policy Planning Secretariat, Ministry of Citizenship and Culture, 1985

TABLE 8: Growth by the Arts Industry Experienced Arts Labour Force, Ontario, 1971

	1971	1981	Difference	% Growth
	MALE AND FEMALE			
ALL INDUSTRIES	3,354,360	4,472,825	1,118,465	33%
ARTS INDUSTRY	67,815	103,920	36,105	53%
% of All Industries	2%	2%	3%	160%
Publishing Only	4,180	8,175	3,995	96%
Publishing & Printing	19,020	18,575	-445	-2%
Radio & TV Broadcasting	9,300	16,555	7,255	78%
Book & Stationary Stores	3,365	6,860	3,495	104%
Schools of Fine/Performing Arts	3,720	4,505	785	21%
Libaries, Museums & Other Repositories	8,395	13,910	5,515	66%
Motion Picture Theatres	4,075	4,775	700	17%
Motion Picture Producers/Distributors	1,990	4,030	2,040	103%
Theatrical/Other Staged Entertainment	3,775	8,710	4,935	131%
Advertising Services	7,415	13,480	6,065	82%
Offices of Architects	2,680	4,345	1,665	62%
	MALE			
ALL INDUSTRIES	2,151,770	2,598,730	446,960	21%
ARTS INDUSTRY	39,080	52,135	13,055	33%
% of All Industries	2%	2%	3%	161%
Publishing Only	1,940	3,420	1,480	76%
Publishing & Printing	13,215	10,215	-3,000	-23%
Radio & TV Broadcasting	6,650	11,005	4,355	65%
Book & Stationary Stores	1,305	2,205	900	69%
Schools of Fine/Performing Arts	1,005	1,150	145	14%
Libaries, Museums & Other Repositories	2,250	3,640	1,390	62%
Motion Picture Theatres	2,075	2,300	225	11%
Motion Picture Producers/Distributors	1,240	2,240	1,000	81%
Theatrical/Other Staged Entertainment	2,730	5,835	3,105	114%
Advertising Services	4,455	6,785	2,330	52%
Offices of Architects	2,215	3,340	1,125	51%
	FEMALE			
ALL INDUSTRIES	1,202,585	1,874,100	671,515	56%
ARTS INDUSTRY	28,750	51,780	23,030	80%
% of All Industries	2%	3%	3%	143%
Publishing Only	2,250	4,750	2,500	111%
Publishing & Printing	5,805	8,355	2,550	44%
Radio & TV Broadcasting	2,655	5,555	2,900	109%
Book & Stationary Stores	2,060	4,655	2,595	126%
Schools of Fine/Performing Arts	2,715	3,355	640	24%
Libaries, Museums & Other Repositories	6,040	10,270	4,230	70%
Motion Picture Theatres	2,000	2,475	475	24%
Motion Picture Producers/Distributors	750	1,790	1,040	139%
Theatrical/Other Staged Entertainment	1,050	2,880	1,830	174%
Advertising Services	2,960	6,695	3,735	126%
Offices of Architects	465	1,000	535	115%

Source: Statistics Canada
Experienced Arts Labour Force, (occupation is based on the 1980 classification and insutry is based on the 1970 classification).

Note: Figures may not add due to rounding.

TABLE 9: Arts Labour Force by Census Metropolitan Area, 1981

CMA	Provincial Arts Labour Force	% Total Provincial Arts Labour Force
OTTAWA	12,185	10.7
OSHAWA	1,645	1.4
TORONTO	59,715	52
HAMILTON	5,115	4
ST. CATHARINES-NIAGARA	2,160	1.8
LONDON	3,880	3.4
WINDSOR	1,870	1.6
SUDBURY	1,055	0.9
THUNDER BAY	940	0.8
Total CMS's	88,565	
Total Ontario Arts Labour Force	114,052	100
Total Ontario Labour Force	4,420,000	

PROFILE

Of the 4.4 million workers in Ontario in 1981, 1.85 million or 41 per cent were women. Within the experienced arts labour force the same ratio exists, 41 per cent of the 114,060 workers are women. While women constitute 41 per cent of the labour force, there is considerable variation by sex across occupations (Table 5). Women predominate in library, museum and the archival sciences, holding 76.8 per cent of positions as well as in teaching where 70.5 per cent of that work force is female. There are more men than women employed as architects or engineers (93 against 7 per cent) and in positions associated with the electronics and communications area (85 per cent versus 15 per cent).

Overall, there are more men than women employed in 7 of the 9 general categories of occupations. Women make up a larger proportion of the arts industry experienced arts labour force, roughly 50 per cent in 1981, as compared with their representation in the experienced arts labour force. Women greatly outnumbered men employed in libraries,museums and other repositories; 10,270 positions to 3,640.

There were many more men than women active in radio and TV broadcasting: 11,005 to 5,555. With respect to growth in the arts industry experienced arts labour force, between 1971 and 1981, the number of women employed in the province increased by 80 per cent, the number of men by 33 per cent. This compares with increases in employment over the same time period across <u>all</u> industries in the province of 56 per cent for women, 21 per cent for men. Nationally the growth in the number of women employed in the arts was even more striking, a 91 per cent increase from 1971 to 1981. The number of men employed in that same time period increased by 37 per cent.

Table 8 documents both national and provincial growth by gender across the arts industry. In 1981, artists across the country were significantly better educated than the Canadian labour force as a whole. While 65 per cent of those in the experienced arts labour force had some post-secondary education or more, only 48 per cent of the labour force had attained a similar level of education. The education profile of the provincial and national arts labour forces are generally similar. Artists are also distinguished from the total population with respect to age. Artists were, on average, younger than the labour force as a whole. Approximately 60 per cent of artists were between 15 and 34 years of age while only 53 per cent of the national labour force fell into the same category in 1981.

Chartrand (1984) notes that 3 per cent of all artists worked after 65 years of age compared to 2 per cent of the total labour force. A discussion of the geographic distribution of artists concludes this section on the profile of artists. Table 9 provides data on the arts labour force by census metropolitan area, 1981.

TABLE 10: Average Total Income of Adult Working Arts Labour Force by Occupation Group, Canada and Ontario

CANADA

Occupation Group	M & F	Male	Female
Total Labour Force	$14,711	$18,286	$9,644
Arts Labour Force			
All Other Occupations			
Architects & Engineers	26,947	28,986	16,228
Library, Museum & Archival Sciences	14,531	18,137	13,442
Other Teaching & Related Occupations	9,572	14,800	7,751
Fine & Commercial Art, Photography & Related	13,069	15,822	9,583
Performing & Audio-Visual Arts	13,896	15,210	10,749
Writing	17,207	20,382	13,569
Printing and Related			
Electronic & Related Communic. Equip., n.e.c.	17,089	18,311	11,152
Other Crafts & Equipment			

ONTARIO

Occupation Group	M & F	Male	Female
Total Labour Force	$15,800	$18,286	$10,428
Arts Labour Force	15,470	18,174	11,468
All Other Occupations	15,808	19,569	10,401
Architects & Engineers	27,072	27,957	15,384
Library, Museum & Archival Sciences	15,875	19,616	14,737
Other Teaching & Related Occupations	10,568	15,418	8,508
Fine & Commercial Art, Photography & Related	14,042	16,976	10,062
Performing & Audio-Visual Arts	1,502	16,283	11,845
Writing	18,674	21,526	15,225
Printing and Related	15,311	17,786	9,520
Electronic & Related Communic. Equip., n.e.c.	17,130	18,252	10,772
Other Crafts & Equipment	13,434	16,192	9,703

Unfortunately no comparable data for 1971 were available. A Census Metropolitan Area (CMA) is an urbanized core or continuously built up area having a population of 100,000. Not surprisingly, perhaps, the arts labour force is concentrated in two areas of the province. In 1981 there were approximately 59,715 members of the arts labour force, 52 per cent of the total provincially, working in the Toronto CMA.

Another 12,185 people, 10.7 per cent of the arts labour force, were located in the Ottawa-Hull CMA. As the Table records, however, a sizeable number of individuals in the arts labour force were to be found in other CMA's; 3,880 people in London, 2,965 in Kitchener and 1,055 in Sudbury. Further, almost 20 per cent, or 22,522 individuals, were not employed in the large CMA's but in communities elsewhere in the province.

INCOME OF ARTISTS

The arts labour force may be subdivided into two broad categories; individuals who are self-employed and those who are employees.

Within the arts labour force, there is considerable variation in the average salaries of specific occupations, differences which are lost in a comparison of average arts labour force and total labour force incomes. Across the country in 1974, there were some 9,778 self employed artists, a figure which increased 71 per cent to 16,715 artists by 1980. Some 7,462 or 46 per cent of self employed artists had taxable income in 1980; 54 per cent had no taxable income. Income measured in constant 1971 dollars fell from $4,835 in 1974 to $4,352 in 1980. Through necessity, many artists procured secondary employment, often in non arts occupations, in order to earn a living. In addition to self employed artists, there were approximately 10,000 fine and commercial artists who worked as employees. The 10,000 fine arts employees were as financially impoverished as the self employed artists. Utilizing data in the Selected Arts Research Statistics 1983, Chartrand concluded that,

> "no artistic profession such as dancer, musician or actor provided a working season of sufficient length or with sufficient salary to support a family of four above the poverty line." (Chartrand, 1984, p. 33).

Table 10 presents data on the incomes of the adult working arts labour force by occupation, Canada and Ontario, 1981. The data suggest that the average salaries of the provincial working arts labour force compare favourably with the average salary of the total labour force nationwide; $15,470 to $14,711 respectively in 1981. Ontario incomes generally, for both men and women, exceed average incomes nationally. The salaries of women in the provincial labour force, however, are 53 per cent to 75 per cent those of men in the same occupational category. When wage and salary income is consid

TABLE 11: Average Total Income of Adult Working Arts Labour Force by Occupation Group, Canada and Ontario

CANADA

Occupation Group	M & F	Male	Female
Total Labour Force	$12,975	$14,894	$6,603
Arts Labour Force	--	--	--
All Other Occupations	--	--	--
Architects & Engineers	23,234	23,652	16,376
Library, Museum & Archival Sciences	5,384	6,797	4,157
Other Teaching & Related Occupations	3,963	6,007	3,197
Fine & Commercial Art, Photography & Related	8,106	9,677	5,223
Performing & Audio-Visual Arts	8,168	8,731	6,267
Writing	7,666	8,554	6,469
Printing and Related	--	--	--
Electronic & Related Communic. Equip., n.e.c.	5,594	5,156	9,067
Other Crafts & Equipment	--	--	--

Source: Profile, Table 26 and Statistics Canada, Table 4

ered, a similar pattern to that discussed with reference to total income, emerges. The provincial arts labour force and national labour force incomes are comparable. Provincial salaries within occupational groupings in 1981 tended to exceed national average salaries in the same categories. The wage and salary incomes of women in the province were 49 per cent to 72 per cent those of men across the nine occupational groupings (Policy Planning Secretariat, 1985).

Thus far it would appear that the income picture for the provincial arts labour force is positive. The data in Table 11 on self employment income, however, suggest otherwise. The average self employment income of the total labour force provincially was $15,796 in 1981, but that of the arts labour force as $10,303; 38.5 per cent less. Furthermore, there was considerable disparity in income across occupational groupings; $3,861 in teaching, $3,611 in library, museum and archival sciences, $8,653 within the performing and audio-visual arts and $7,581 across occupations subsumed within the writing group. Self Employment incomes in Ontario fell below those of the nation as a whole. Again, the self-employment incomes of femaleswere much lower than those of males (42 per cent to 91 per cent of males' salaries) with the notable exception of the electronics and related communications equipment group where the income of females as a percentage of the income of males was 294 per cent.

The authors of the Task Force on the Status of the Artist (1986) referred to artists' income as "life below the poverty line." Over the course of their consultations the authors heard from artists and organizations across the country. In Toronto, ACTRA officials told the Task Force that 66.9 per cent of their members earn $5,000 or less per annum. In Montreal, the Regroupement des professionels de la danse du Quebec Inc. indicated that the average annual income of a dancer in Quebec was $3,500; of a choreographer, $1,800. Visual artists related their problems in finding affordable living and studio space on incomes barely exceeding $7,000. Summarizing all of the figures on income, the Task Force reported that not one discipline of the arts in Canada earns an average income above the poverty level,a tangible reflection of the status of the artists in Canadian society.

SUMMARY

This section has been concerned primarily with the magnitude of the arts sector in Ontario, or to put this another way, with the"supply" of artistic activities in the province. It has been demonstrated that the arts in Canada are a significant economic force, comparable in numbers of employees to agriculture or the total federal government employment. When compared to the 20 largest Canadian manufacturing industries, the arts ranked 9th in revenues, 4th in number of employees and 6th in wagesand salaries in 1982. The Ontario contribution to the na-

tional artistic and cultural scene is vital in almost all forms of artistic expression, for on most measures of artistic activity Ontario contributes one half or more of the national activity. Within Ontario, Toronto plays a dominant role and is the main centre,both provincially and nationally, of artistic expression. In the past twenty years, there has been considerable growth in artistic activity in the province. The number of arts organizations and individual artists has grown considerably and there has been a diversification of forms of artistic expression. While Toronto has dominated and continues to dominate artistic expression throughout the period, a number of secondary centres of excellence have developed, and artistic activity has been diffused throughout the province.

Artistic employment has increased at a greater rate than the growth of employment as a whole. However, as a group, artists still constitute a relatively young, disproportionately female and poorly remunerated group. They include many members of socio-economic classes who are vulnerable to the vicissitudes of the economy in times of economic restraint. At the same time, because salaries in the arts are often low, investments in the arts may have a disproportionately large impact on employment. The data indicate the existence of a vibrant artistic community in the province and they also suggest the crucial role played by the province in the national context. However, as a group, artists are poorly remunerated. It is in the national, as well as the provincial interest, to ensure that the level and quality of artistic activity in the province is maintained and enhanced.

THE MAGNITUDE AND CHARACTERISTICS OF THE ARTS CLIENTELE

The "nature of the demand for the arts and the effect this complex structure has on the arts" (Boulding, 1986, p. 11) raise both interesting and difficult questions. Advances in technology have contributed to an enormous expansion in the arts audience enabling virtually everyone to have an arts experience of some kind. Concomitantly, fundamental demographic changes in levels of education, the composition of the labour force and the age profile of the population are transforming the economy and fuelling growth in the arts audience. The Ontario Arts Council operates in this changing environment and is empowered to "promote the study and enjoyment of and the production of works in the arts" (Ontario Arts Council Members' Manual, 1985, p. 1).

This section of the report will examine the "demand" side of the arts through a consideration of the nature and extent of consumption. Specifically, the audience for the arts will be examined under the following headings:

1. Attitudes towards the Arts
2. Involvement in the Arts
3. Size of the Arts Audience
4. Attendance: Levels, Patterns and Frequency
5. Socio-demographic Profile and Demographic Change
6. Box Office Revenues

The intent is to place the discussion of audiences and the arts in Ontario within the context of a discussion of Canadian audiences generally. Hence, reference will be made to studies conducted at local, regional, provincial and national levels.

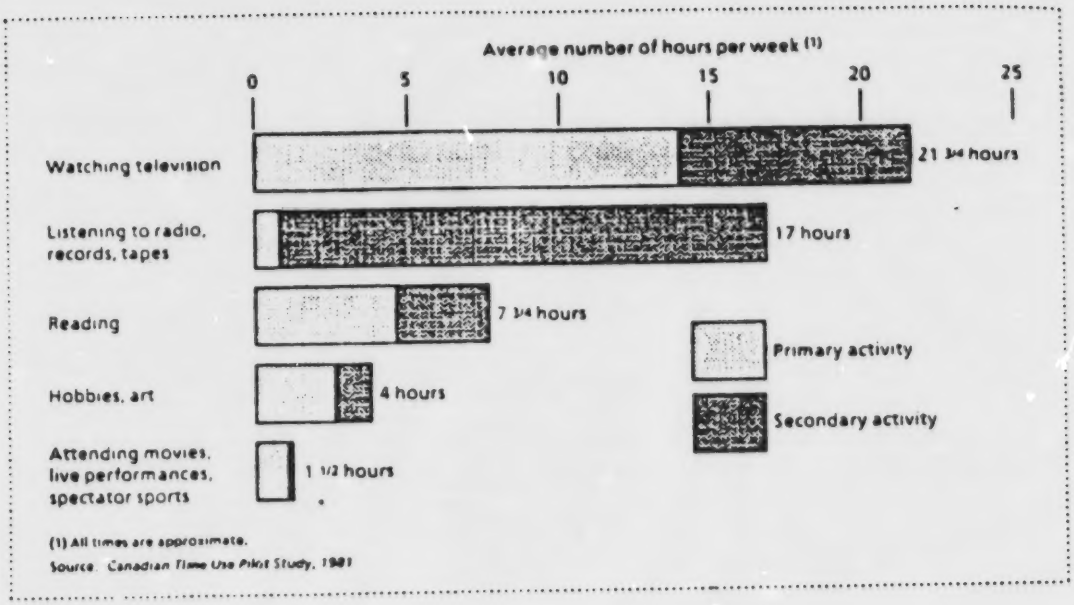
ATTITUDES TOWARDS THE ARTS

As a general statement it is probably fair to say that while there exists some broad appreciation for the role of the arts there also exists some uncertainty as to the extent to which the arts are a high priority when ranked alongside services like schools, hospitals and roads (Access, 1983; Zuzanek, 1987). Nevertheless, few would question the important role played by artists as ambassadors of our province and country. In a national survey of Canadians conducted by Goldfarb Consultants for the Federal Department of Communications, the authors conclude that:

> "from the data, it is evident... Canadian culture and its products like Canadian artists and performers with international recognition are some of the greatest sources of pride in our country" (Goldfarb Consultants, 1983, p. 7).

In a survey of Ontario residents, 90 per cent of respondents reported that museums and theatres were either very important or somewhat important to quality of life in communities, 82 per cent rated the same sectors as important to business and the economy of the community, while 91 per cent felt such amenities contrib-

FIGURE 1: Hours Per Week Spent on Cultural Activities, 1981



uted to making a community a better place to live (Access, 1983). Both at the national and provincial levels there was support for "school board courses in the arts" (Access, 1983) and for "a viable mix of both arts and technology in education" (Goldfarb Consultants, 1983, p. 7).

With respect to the funding of the arts nationally, "Canadians find the development and nurturing of culture in Canada a worthy area for government support" (Goldfarb Consultants, 1983, p. 7).

A survey of Ontario residents, however, found that "Knowledge about how the Arts are financed is poor" and that respondents could provide "no clear consensus about which level of government should have primary responsibility for financial support" (Access, 1983, p. 5). At least one study at the community level undertaken in a south western Ontario city (Kitchener-Waterloo) reported considerable agreement "that grass root development of the arts is most important for vigorous cultural life" (Zuzanek and Mannell, 1983, p. 21). Such a response begs questions not only around "who contributes how much money?" to the Arts but also "for what projects?"

On the basis of their study, Zuzanek and Mannell (1983) concluded that the "mood among respondents appeared to be that of considerable fiscal conservatism with respect to the arts" (p. 21). Further, the authors cautioned that "appreciation does not amount to an unconditional endorsement of an extensive programme of public spending for the arts" (Zuzanek and Mannell, 1983, p. 23). Of course, the aforementioned survey reflects the opinions of but one community at a particular point in time. However, Zuzanek's work at another level, on the attitudes of elected municipal officials, 1975-1985, suggests that while there has been a substantial increase in municipal support for the arts over the past decade, municipal officials would prefer arts organizations to raise their revenue by increasing the share of "user fees" or "private donations" rather than through allocation of more funds from the municipal purse.

As will be discussed later, there is a limit to which user fees or ticket prices can be raised, beyond which one risks disenfranchising members of both the "committed" and "extended" arts audiences. Indeed it is Cheney's contention that the "costs of the arts to the public are beginning to be perceived as too high, especially in the case of students, many senior citizens and low wage earners" (Cheney, 1985, p. 19).

The Access (1983) study also pointed out that accessibility might be compromised if too much dependence was placed on box office receipts to fund artistic activities.

INVOLVEMENT IN THE ARTS

There are many perspectives from which to discuss involvement in the

FIGURE 2: Popularity Ranking of Arts-Related Leisure Activities

Activity	Goldfarb Study (1) (1983)	Leisure Study (2) (1975)
Listen to radio	1	2
Watch television	2	1
Read a book	3	4
Listen to tapes or records	4	3
Visit a library	5	5
Go to the movies	6	4
Attend a music concert	7	8
Go to live theatre	8	7
Visit a museum	9	6
Visit an art gallery	10	6
Attend an opera	11	10
Attend the ballet	11	11

Sources: Derived from Goldfarb Consultants (1983, p. 5);
Schliewen (1975, pp 18-19, p. 25).

Notes: (1) Ranking based on index of frequency of involvement
(2) Ranking based on participation rate.
(3) More than one activity may have the same level of p

Arts. Authors have argued that participation is determined by the "respondent's familiarity with the cultural code" (Zuzanek and Mannell, 1983, p. 7); Gans (1974) suggested that differences in involvement can be explained in terms of taste cultures; Boulding (1986) insists that social learning is the central concept of culture. Understanding the "why" behind involvement is a complex task and beyond the scope of this report. Instead the focus here will be on participation in the arts with reference to time spent, and frequency and nature of activities attended.

Findings from the Canadian Time Use Pilot Study, 1981, in which randomly selected Canadians aged fifteen and over were surveyed, suggest that respondents were engaged in cultural pursuits, on the average, 2.7 hours a day (Kinsley and Cassery, 1984). While this figure is comparable to the 158 minutes Clarkson Gordon (1986) cite as allocated daily by Canadians to theatre, the arts and popular culture, it should be remembered that differences exist in relative allocations to work, maintenance, and leisure by age, income, education, gender and any of a number of other variables.

As the graph on time spent on cultural activities, 1981, illustrates (Figure 1), involvement with the mass media in the form of television-watching or radio and record-listening dominates the leisure of the adult population with respondents reporting almost twenty two hours of viewing and seventeen hours of listening weekly. Roughly eight hours in the week are allocated to reading, four hours to creative hobbies or arts related activities and the balance, 1.5 hours, to attending movies, live performances and spectator sport.

McCaughey (1984) has constructed a table ranking the popularity of arts-related leisure with data drawn from studies conducted at the national level in 1975 and 1983 (Figure 2). While her rankings are based on frequency of involvement and participation rates, not time allocated, the ordering corroborates the dominance of personal involvement in mass media/home centred activity in contrast with participation in out-of-home activities like going to the movies or more traditional arts activities like attending an opera or ballet. With reference to out-of-home activities, it appears that the relative popularity of movies, and visiting museums and art galleries has declined somewhat from 1975 to 1983, while the performing arts activities have stayed at roughly the same relative levels of popularity.

The finding in the aforementioned studies, as well as those of Zuzanek and Mannell (1983) on participation in selected leisure and cultural activities, highlight the importance of:

1. having a perspective on the overall context in which participation in cultural and artistic activities occurs;

TABLE 1: Estimated Canadian Audiences by Art Form, 1981

Activity	Attendance/ Paid Circulation	Average Annual Frequency of Attendance	Estimated Audience Size
PERFORMING ARTS	8,815,000		
Theatre	5,605,000	4.7	11,193,000
Music	1,877,000	7	2,680,000
Dance	953,000	1.3	733,000
Opera	380,000	1.3	292,000
VISUAL ARTS	9,052,604		
Art Galleries	4,588,518	2.53	2,294,000
Musuems	4,464,086	1.97	2,232,000
LITERARY ARTS			
Books--Non-fiction			2,052,000
Books--Fiction			3,351,000
Periodicals	403,363		
MEDIA ARTS			
Cultural Television			5,347,000
Frequent Viewers			374,000
Occasional Viewers			4,973,000
Film Arts			
Video Arts			
Canadian Adult Population			18,609,000

2. recognizing the sometimes competing claims made on discretionary time by the myriad of leisure activities available (not to mention work and maintenance commitments);

3. understanding that the participation base for the traditional arts, so-called "high culture", albeit growing, remains smaller then the base for some other leisure activities.

SIZE OF THE ARTS AUDIENCE

It is important to make the distinction between audience and attendance. The audience for a particular discipline consists of the "number of patrons whether they attend once or many times" (McCaughey, 1984, p.1). Annual attendance, by contrast, is the sum of the raw count of individuals attending performances, galleries or the like. Defined thus, multiple counting of individuals occurs for those individuals who attend more than once during the year.

Several difficulties are encountered in any estimate of the size of the arts audience. One of these is definitional; what are "the arts?" Another is the existence of audience overlap explained as patron participation in more than one arts activity. Because of audience overlap it is not really possible to merely sum the audiences across respective disciplines to arrive at a total figure for the size of the arts audience. Instead, authors will sometimes employ a proxy to estimate the magnitude of the audience.

Table 1 contains estimates, derived from attendance figures, of the size of the Canadian audience by art form. The size of the performing arts audience for 1981 is probably understated as the figures reflect attendance at performances of Canada Council- supported professional companies; 190 in total in 1981. If attendance figures from other professional and amateur groups had been included, the figure could have reached 3 to 4 million of which the largest proportion of participants would have been theatre-goers. The size of the audience for the visual arts would appear to be about equally shared between art galleries and museums at 2.29 and 2.23 million people respectively. Within the literary arts, readers of fiction (3.35 million) outnumber those of non-fiction (2.05 million) while within the media arts, the audience for cultural television was estimated to be approximately 5 million in 1981.

Missing completely from the table is any estimate of the cinema audience. While the commercial cinema audience was about 5 million individuals in 1981, the proportion of cinema-goers who attend art films is unknown.

Estimates of audience size based on the proportion of the population with some post-secondary education have been calculated by the Research and Evaluation staff of the Canada Council. The use of education as a proxy is argued on the basis of the known close a so-

TABLE 2: Growth in the Fine Arts Audience in Canada (Picot, 1980)

	Population (000's)	Audience (000's)	Audience as a % of Population
1961	12,046	1,432	12%
1971	15,288	2,749	18%
1977	17,453	4,556	26%
1981	18,609	5,145	28%
1985	19,802	6,164	31%
1990	20,905	7,060	34%
1995	21,962	7,869	36%
2000	23,021	8,713	38%
GROWTH			
1981 - 2000	24%	69%	

TABLE 3: Growth in the Fine Arts Participation Rates, 1961 - 2000

	1961-71	1971-77	1977-85	1985-90	1990-2000
Adult Population	2.3%	2.3%	1.6%	1.1%	1.0%
Reading	2.8%	3.0%	2.1%	1.6%	1.4%
Museums & Galleries	4.1%	4.9%	2.6%	2.0%	1.9%
Libraries	4.0%	4.6%	2.4%	1.6%	1.6%
Live Theatre	3.6%	4.0%	2.1%	1.5%	1.7%
Commercial Film	3.6%	3.3%	1.3%	0.2%	0.6%
Television	2.2%	1.9%	1.4%	0.9%	0.8%
Sports	2.6%	2.2%	1.3%	0.7%	0.9%

Source: G. Picot, The Changing Education Profile of Canadians: 1961 to 2000, Statistics Canada, 1980

TABLE 4: Economic Dimensions of the Culture Sector (Performing Arts), 1984 - 85

	Music	Dance	Theatre	Total All Companies
	(Non-Profit Professional Companies)			
Dimension				
# of establishments	76	19	9	144
# of spectators('000s)	2,515	882	2,747	6,144
Ontario as a % of Canada				
# of establishments	42	31	23	32
# of spectators	60	46	36	45

ciation between arts attendance and higher education. (Based on projected 1986 population of 25.583 million (Research and Evaluation, Canada Council, 1986) and a projected 31 per cent of the population with some post secondary education (Picot, 1980). Adults defined as more than 15 years of age.)

In 1981, 28 per cent of Canadians had some post secondary education. This figure represents a potential fine arts audience of 6.6 million adult Canadians (Research and Evaluation, Canada Council, 1986). A comparable estimate for 1986 would result in an estimated audience of 7.9 million adult Canadians.

Estimates of the Ontario fine arts audience based on education as the proxy have been calculated by the Canada Council. For 1981, the figures were as follows:

Ontario -- 2,418,000

Toronto CMA -- 972,000

Ottawa-Hull CMA -- 255,000

Ontario part only -- 209,000

Hamilton CMA -- 149,000

Elsewhere in Ontario -- 1,088,000

A comparable estimate for the province for the year 1986 would be 2,838,600 individuals based on 31 per cent of the total population of 9,156,000 having some post secondary education.

ATTENDANCE: LEVELS, PATTERNS AND FREQUENCY

The 1987 Department of Communications publication Vital Links describes Canadians as "avid consumers of cultural products"; the second highest per capita purchasers of records and tapes in the world; among the world's great film-goers; in attendance over 1985 at more professional theatre, dance and musical performances than professional sports events (Department of Communications, 1987).

Some sense of the magnitude of attendance at arts events is reflected in Table 1. In 1981, 8.8 million people attended performing arts performances; 5.6 million to theatre, 1.87 million music; 953,000 dance and 380,000 opera. The visual arts attracted 9.6 million spectators with art galleries receiving roughly 47 per cent of that figure and museums the balance.

Commercial cinema attracted 85 million film-goers in 1981 and book readership was estimated by Lorimer and Shaw (1978) to be around 7 million. Paid circulation for 80 literary, artistic and children's periodicals stood at 403,363. More recent estimates establish attendance figures of 13.65 million for the performing arts in 1986 (Economic Dimensions of the Culture Sector, 1986) and 10.5 million in attendance for the visual arts, 1985-86. The Royal Ontario Museum alone reported nearly one million visitors (Council for Business and the Arts in Canada, 1986). The CBAC

figures on attendance at art galleries and museums likely underestimate the number of visitors as only galleries and museums with revenue in excess of $40,000 are sampled.

With respect to patterns of attendance, while there is considerable variation over time, between and within disciplines and subdisciplines, some general comments can be made. In the traditional arts (performing and visual), a greater proportion of the population attends theatre at least once in a given year then attends music, dance or opera. There are more "frequent" patrons of music and theatre than of art galleries, ballet, opera and museums. The average frequency of attendance among music devotees is generally higher than that for theatre, dance and opera. Dance reaches a fairly wide audience through touring, while art galleries and museums reach a broad though perhaps less committed audience (McCaughey, 1984).

Considerable growth has been experienced, both in Canada and the United States, since the seventies with respect to both the size of the arts audience and levels of participation (McCaughey, 1984; Chartrand, 1984: Hart, 1984). This growth is projected to continue through the year 2000 fueled by rising levels of education, changes in composition of the labour force, the "greying" of the population and changes in the nature of consumption (Chartrand, 1986). The extent of this real and estimated growth is reflected in the figures in Table 2 based on data from the 1981 Census. From 1961 through 1981, the fine arts audience grew from 1.4 million, or 12 per cent of the Canadian population, to 5.1 million, or 28 per cent of the population. By the year 2000, the projected audience of 8.7 million will comprise 38 per cent of the total population. A similar pattern of growth can be traced in attendance. Between 1977 and 1985, while the adult population grew at an annual rate of 1.6 per cent, participation in the fine arts grew significantly faster.

Attendance at museums and galleries increased 2.6 per cent per year, use of libraries 2.4 per cent and attendance at live theatre 2.1 per cent. Participation in reading increased 2.1 per cent and attendance at commercial film 1.3 per cent. During the same time period attendance at sports events climbed 1.3 per cent per year and television viewing 1.4 per cent (Picot, 1980).

Participation in the fine arts is projected to exceed adult population growth through the year 2000.

The aforementioned figures are illustrated in Table 3 with additional data from 1961 through to the year 2000.

Considered in the context of the rest of the country, Ontarians are both major producers and consumers in the arts industry. With reference only to the performing arts, Ontario "accounts for about 32 per cent of the groups and 45 per cent of the audience" (Economic Dimensions of the Cultural Sector,

1986). In 1985, over 6 million people attended performing arts performances in Ontario. As the accompanying table on the economic dimensions of the culture sector in Ontario illustrates (Table 4), theatre with 2.7 million spectators and music with 2.5 million appear to be the most popular of the performing arts disciplines, accounting for 36 per cent and 60 per cent of the audience nationwide. While attendance is lower for dance, a function perhaps of fewer companies thus fewer performances (76 and 49 establishments for music and theatre; 19 for dance), the Ontario dance attendance figure constituted 46 per cent of spectators attending dance performances nationally in 1984-85.

Examined regionally, the audience for the performing arts tends to be clustered. On the basis of data on spectators from the Provincial and Metropolitan Accounts (1986) for the year 1983 in which performing arts spectators numbered 3.425 million, roughly 1.65 million (48 per cent) of those attending were at performances in the Toronto CMA; 117,000 or 3 per cent attended events in the Ottawa CMA and 98,000 or 2 per cent attended performances in the Hamilton CMA.

Attendance at performing arts events, while significant, is a measure of demand within one sector of the arts and clearly would be an underestimate of the attraction of the arts as a whole. Indeed Cheney (1985) estimated that in the year ending June 30, 1984, the non profit arts and culture sector drew six million attendees in Toronto alone, an estimate which did not take into consideration attendance at movies, rock and jazz concerts, commercial or dinner theatre, cabaret, publishing or broadcasting. The significant level of support currently enjoyed by the performing arts in Ontario represents a considerable broadening of the audience base as measured against data collected in 1974.

As reference to Table 5 corroborates, significantly more people in Ontario attended plays and musicals (55 per cent), ballet and modern dance performances (23 per cent) and symphonic and other classical concerts (33 per cent) in the year 1983 than did in 1974. No significant change was observed in attendance at operas or operettas (Access, 1983). In the twelve months preceding the 1983 Access survey, 74 per cent of Ontarians reported visiting a library at least once, 60 per cent a museum or science centre, 56 per cent a museum or art gallery, 55 per cent a live play or musical, 52 per cent a presentation of arts and crafts, 33 per cent a classical music concert, 23 per cent a performance of ballet or modern dance and 13 per cent an opera or operetta (Access, 1983).

Highest levels of participation across all activities surveyed were reported by the frequent attendees, those individuals who attended six or more performances per year. Enthusiastic supporters of <u>all</u> arts and cultural activities

TABLE 5: Comparative Data on Frequency of Attendance at Selected Artistic and Cultural Activities in the Past 12 Months

	ONTARIO			UNITED STATES
	1983	1974	1980	1975
	%	%	%	%
(BASE)	(1000)	(1004)	(1505)	(3005)
LIVE PLAYS/MUSICALS				
None/Not Stated	45	58	42	59
Once	12	11	8	8
Two to three times	23	17	22	15
Four to five times	9	6	11	8
Six to ten times	7	5	10	6
More than ten times	4	3	7	4
BALLET/MODERN DANCE				
None/Not Stated	77	87	75	84
Once	12	6	7	6
Two to three times	7	4	10	6
Four to five times	2	1	4	2
Six to ten times	1	1	2	1
More than ten times	1	1	1	1
CLASSICAL MUSIC				
None/Not Stated	67	74	74	83
Once	13	9	6	5
Two to three times	10	10	12	6
Four to five times	3	3	3	3
Six to ten times	5	2	4	2
More than ten times	3	2	2	2
OPERA/OPERETTAS*				
None/Not Stated	87	89	74	n/a
Once	7	6	8	n/a
Two to three times	4	3	11	n/a
Four to five times	1	1	4	n/a
Six to ten times	1		2	n/a
More than ten times		1	1	n/a
PUBLIC ART GALLERIES				
None/Not Stated	45	n/a	40	n/a
Once	20	n/a	16	n/a
Two to three times	22	n/a	23	n/a
Four to five times	6	n/a	9	n/a
Six to ten times	4	n/a	7	n/a
More than ten times	5	n/a	5	n/a
MUSEUMS/SCIENCE CENTRES**				
None/Not Stated	40	n/a	27	n/a
Once	20	n/a	9	n/a
Two to three times	25	n/a	15	n/a
Four to five times	8	n/a	15	n/a
Six to ten times	4	n/a	18	n/a
More than ten times	3	n/a	17	n/a

* Note that United States surveys combined opera and musical theatre, treating live plays as a distinct category.

** The United States surveys include art museums

surveyed, this group represents 24 per cent of the Ontario population.

SOCIO-DEMOGRAPHIC PROFILE AND DEMOGRAPHIC CHANGE

The arts audience differs from the total Canadian population in its sociodemographic composition, most noticeably with respect to education. It does not logically follow, however, that the audience for the arts is elitist or homogeneous. Audience composition differs markedly across art forms, disciplines and communities. Wall and Mitchell (1983), in a review of orchestral studies, reported distinct differences in audience profiles with respect to age and in come within the same discipline and across distinct communities. In a separate publication the authors concluded that:

> "while surveys demonstrate a significant relationship between socioeconomic characteristics and patronage of the arts for the total population the relationship is not a simple causal one and breaks down at the individual level" (Wall and Brown, 1983, p. 24).

Indeed, a number of authors suggest that a more complete understanding of participation in the arts would involve a consideration of traditional socio-demographic, socio-economic, life-cycle, marital and family-status variables, as well as attitudinal, cognitive, socio-cultural and socio-psychological analyses (Book and Globerman, 1975; Zuzanek and Mannell, 1983; McCaughey, 1984).

The focus of this section, however, is a discussion of the association of education, gender and age with participation; traditional sociodemographic variables which are currently strong indicators of changing patterns of employment and consumption. Audience growth will be discussed with reference to the same variables.

The sociodemographic variables of education, income, age and occupation are strongly interrelated but it is education which is most consistently related to arts participation. In 1977, while 27 per cent of the Canadian population had some post secondary education, 43 per cent of theatre audiences, 47 per cent of public library and 51 per cent of museum and gallery visitors reported some post secondary schooling. Book and Globerman (1975) sampled performances by large and small companies, traditional and experimental, repertory groups, domestic and imported companies across the breadth of urban Ontario and reported that "there seems to be no type of live arts presentation that attracts relatively uneducated audiences" (Book and Globerman, 1975, p. 5-6). Dimaggio, Useem and Brown (1977), authors of a review of audience studies for the performing arts and museums sponsored by the National Endowment for the Arts, offer some reasons why educational attainment is the single most important variable in the social profile of attendees:

> "schooling provides formal training in the arts, a social milieu encouraging participation, opportunities

> to attend and a family habit which is passed down to children." (Dimaggio, Useem and Brown, 1977, p.2).

With respect to the latter statement, it is generally recognized that childhood exposure to the arts is fundamental to the development of future audiences. Book and Globerman's (1975) research findings suggest that age of attendance at one's first live performance is directly related to frequency of attendance as an adult; the younger, the more frequent. Currently, an increasing number of children are attending performing arts performances, with children making up 20 per cent of the contemporary audience (McCaughey, 1984).

Level of education is also predictive of those who attend museums and those who do not. Kelly (1984, p. 23) states that the "demographic profiles of the performing arts attendees and museum visitors are quite similar." The author argues that while there are:

> "undeniably more museum visitors... it appears, primarily, more people are being attracted from the demographic strata that have always dominated visitor statistics." (Kelly, 1984, p. 23).

Broadening the definition of museums to include historical sites, restorations, science centres and museums of technology has the effect of generating a broader visitor profile, however one in which education attainment is still "an important explanatory variable" (Kelly, 1984). The strength of the association between frequency of attendance and education is particularly significant in light of the real and projected growth in the size of the Canadian population with some post secondary education; from 27 per cent in 1977 to 38 per cent in the year 2000 (Picot, 1980). Next to education, sex is the best demographic indicator of arts participation in North America (Chartrand, 1987). Women make up some 60 per cent of the arts audience, outnumbering men in the performing arts audiences, particularly dance. In the visual arts, the trend seems to be for women to slightly outnumber men in the public galleries while the reverse is true with respect to public museums and science centres where attendance by men slightly outnumbers that of women. Within the media arts, men outnumber women only in attendance at commercial films (McCaughey, 1984).

Women have also dominated voluntary labour in the arts with galleries in particular reporting a high dependence on the voluntary efforts of women (Ontario Arts Council, 1981; McCaughey, 1985). The traditional role of women as guardians and carriers of culture (Chartrand, 1981), their significance in both the arts audience (60 per cent) and the arts labour force (50 per cent in 1981), coupled with the emergence of women into the economic (54 per cent of labour force in 1985) and political mainstream of the country portends an increased recognition

of arts and culture in Canadian society (figures from Chartrand, 1987).

After education and sex, age is the best demographic indicator of participation in the arts. While it is difficult to make generalizations about the profile of arts audiences with respect to age because profiles vary across art forms, it is generally recognized that the older one grows, the more likely one is to participate in arts-related activities, at least up to retirement (Chartrand, 1987). The "greying" of the population, then, has implications for arts attendance. By 1996, nearly 8 million people, or 28 per cent of Canadians, will be over the age of fifty. The trend will become more exaggerated as the highly-educated baby boom generation of the 50's and 60's forms the geriatric boom after the year 2000. It is this large, young, educated cohort which is the mainstay of arts audiences today and the promise for audiences tomorrow (McCaughey, 1984).

Three fundamental changes, then, in the profile of the population -- rising education, increasing participation of women and the aging of the population -- are interacting to affect change both in the nature of the economy and the extent and rate of participation in the arts. The Task Force on Funding for the Arts (Bovey, 1986) refers to the "evolution in tastes and makeup of society largely rooted to changes in levels of academic education" (p. 29) as a force in furthering excellence through a changed rapport between artists and audience. The implications of demographic change with reference to the arts are indeed broad.

BOX OFFICE REVENUE

By definition, the non profit arts do not make money. Funds for the sector, like Blanche Dubois, Tennessee Williams's heroine, depend upon the "kindness of strangers" (Hart, 1984). The strangers in this case are those individuals who purchase tickets, subscriptions, become patrons or respond to appeals.

Figures from the CBAC annual survey of the performing arts (1986) suggest that box office and earned revenue provided 54 per cent of total revenue in 1985-86, up from 52 per cent in 1984-85. Figures for Ontario alone are comparable. Canada Council estimates box office earned revenue provided 49 per cent of total revenue across all disciplines (Provincial and Metropolitan Accounts, 1986). The Stratford Festival, with revenues of 10 million dollars, reported the largest take at the box office followed by the Toronto Symphony with gate receipts 65 per cent those of Stratford (1985-86).

With attendance at performances of performing arts groups in Ontario (excluding NAC) totalling 6 million in 1985, audiences spent nearly 50 million dollars on tickets and, on average, expenditures per spectator of $15.54 (Economic Dimensions of the Cultural Sector, 1986). By way of comparison, Book and Globerman (1975)

reported a total attendance of 3.5 million with earned revenues of 11.7 million for the year 1971-72 across professional performing arts organizations in Ontario. The real difference in the two estimates is probably underestimated as Book and Globerman included data from amateur theatre and choral groups in their analysis. McCaughey (1984) notes that while attendance has increased at the performing arts, especially theatre, the real cost of attending has not. For all disciplines considered together (national perspective), box office expenditures per spectator have fallen: from $2.75 to $2.02 in constant 1971 dollars, between 1971 and 1980.

While the "real" cost of attending may not have risen, there is a perception that the costs of the non profit arts to the public are beginning to be seen as too high (Cheney, 1985). In both the Book and Globerman study of 1975 and the Access Survey of 1983, cost was found to be a major variable affecting attendance, especially for young adults, female respondents generally, those in lower income brackets and frequent attendees who would like to attend more. The findings from the Book and Globerman (1975) study led the authors to conclude that increasing ticket prices did not seem, in general, to be a viable means of significantly increasing revenue since substantial decreases in total attendance would probably accompany such price increases.

SUMMARY

It has been demonstrated that residents of Ontario are generally positively disposed to the arts and to public spending on artistic activities but it remains unclear exactly where they rank the arts in the context of other demands on the public purse. It is clear, however, that there is a large and growing clientele for the arts and that residents of Ontario spend a great deal of time and money in artistic pursuits. Furthermore, demographic trends suggest that "demand" for artistic experiences is likely to continue to increase in the future. Participation in the arts tends to increase with age and education and the Ontario population is likely to grow in age and education in the future. However, interest in the arts is not restricted to such groups and the evidence suggests that the arts clientele has broadened in recent years. Although the "real" cost of attending artistic events may not have risen, Cheney (1985) has suggested that costs of attendance are beginning to be perceived as too high. This suggests that too much reliance should not be placed on box office receipts for the funding of the arts, for such a strategy might restrict the accessibility of disadvantaged groups to artistic experiences, and frustrate the growing demand which is suggested by current trends.

DIRECT IMPACTS

Direct benefits have been defined by Wall and Brown (1983) as "expenditures of an organization and its patrons in the local community." However, there is some disagreement in the literature concerning the treatment of audience expenditures as direct or indirect impacts.

This section will be concerned primarily with the income and expenditures of arts organizations. The income of arts organizations from the public sector (federal, provincial and municipal governments), private donations (including corporate funding), and earned income will be documented. The latter complements the information on expenditures on admissions and subscriptions examined in an earlier section.

GOVERNMENT FUNDING

The most reliable statistics concerning public sector funding are to be found in the technical tables of the Tri-Level Cultural Expenditure Data Base (The Canada Council, 1986). Unfortunately, the data are reported on the broad category of culture rather than the arts. According to the Canadian System of Government Financial Management Statistics, from which the data are abstracted, "cultural facilities" covers outlays on archives, historic sites, art galleries, museums, libraries, centres for the performing arts, zoos, aquariums, aviaries and planetariums. The data combine both grants in aid of cultural facilities as well as expenditures on facilities per se.

The Tri-Level Culture Expenditure Data Base understates government support to culture for two reasons. First, the provinces are providing support to culture out of lottery revenues which are not included in the data. Secondly, public broadcasting, including the CBC and provincial education broadcast authorities, is excluded. Thus, while the data refer to culture, rather than the arts per se, they tend to be conservative. A summary of government spending on culture is presented as Table 1. In 1982-3, the most recent year for which data are available, the gross general expenditure of federal, provincial and local governments was $214,113.9 millions, of which $1,212.9 millions, or 0.6 per cent, were spent on culture. The total government outlay on culture in both current and constant dollars has risen substantially since 1972-73 but as a proportion of government spending it has remained largely unchanged.

Federal government expenditures on culture were $335.3 millions in 1982-83 out of a gross general expenditure of $94,003.2 millions i.e. 0.4 per cent. The culture spending of the federal government rose from 1972-73 in real terms to a peak in 1978-79, since when it has declined in real terms by 19.1 per cent.

The Ontario Provincial Government spent $114.9 million on culture out of a gross general expenditure in 1982-83 of $23,932 mil-

TABLE 1: Tri-Level Cultural Expenditure

	1972-73	1973-74	1974-75	1975-76	1976-77	1977-78	1978-79	1979-80	1980-81	1981-82	19
Millions of Current Dollars											
Tri-Level	269.2	325.2	427.4	493.2	538.2	670.1	751.5	825.7	983.8	1,089.4	1,2
Federal	63.8	87.4	126.1	161.3	154.7	222.7	265.2	245.7	314.5	353.0	3
Provincial	71.1	91.2	116.2	154.7	167.2	210.5	233.4	288.6	323.5	349.1	4
Local	134.3	146.6	185.1	177.2	216.3	236.9	252.9	291.4	345.8	387.3	4
Ontario	92.6	108.4	139.8	151.9	184.6	202.7	214.2	255.7	273.6	306.8	3
Province	32.9	32.1	42.4	56.5	60.9	65.0	68.1	82.8	84.6	101.2	1
Local	59.7	76.3	97.4	95.4	123.7	137.7	146.1	172.9	189.0	205.6	2
Millions of Constant 1971 Dollars											
Tri-Level	251.1	279.4	316.3	316.2	303.4	344.5	356.7	359.3	378.4	368.5	3
Federal	59.5	75.1	93.3	103.4	87.2	114.5	125.9	106.9	121.0	119.4	1
Provincial	66.3	78.4	86.0	99.2	94.3	108.2	110.8	125.6	124.4	118.1	1
Local	125.3	125.9	137.0	113.6	121.9	121.8	120.0	126.8	133.0	131.0	1
Ontario	86.4	93.1	103.5	97.4	104.1	104.2	101.6	111.2	105.2	103.8	1
Province	30.7	27.6	31.4	36.2	34.3	33.4	32.3	36.0	32.5	34.2	
Local	55.7	65.5	72.1	61.2	69.7	70.8	69.3	75.2	72.7	69.6	
As a Percentage of Tri-Level Cultural Expenditure											
Tri-Level	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	1
Federal	23.7	26.9	29.5	32.7	28.8	33.2	35.3	29.8	32.0	32.4	
Provincial	26.4	28.1	27.2	31.4	31.1	31.4	31.0	35.0	32.9	32.0	
Local	49.9	45.1	43.4	36.0	40.2	35.3	33.6	35.3	35.2	35.5	
Ontario	34.4	33.4	32.7	30.9	34.3	30.2	28.5	31.0	27.8	28.1	
Province	12.2	9.9	9.9	11.5	11.3	9.7	9.1	10.0	8.6	9.3	
Local	22.2	23.5	22.8	19.4	23.0	20.5	19.4	21.0	19.2	18.9	
As a Percentage of Gross General Expenditure											
Tri-Level	0.5	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	
Federal	0.3	0.4	0.4	0.4	0.4	0.5	0.5	0.4	0.5	0.4	
Provincial	0.4	0.4	0.4	0.4	0.4	0.5	0.5	0.5	0.5	0.5	
Local	.3	1.3	1.4	1.1	1.2	1.1	1.1	1.2	1.2	1.2	
Ontario	--	--	--	--	--	--	--	--	--	--	
Province	0.5	0.4	0.4	0.5	0.5	0.5	0.4	0.5	0.5	0.5	
Local	1.4	1.6	1.8	1.5	1.8	1.7	1.7	1.9	1.9	1.8	
In Constant 1971 Dollars Per Capita											
Tri-Level	11.6	12.7	14.2	14.0	13.2	14.8	15.2	15.2	15.8	15.2	
Federal	2.7	3.4	4.2	4.6	3.8	4.9	5.4	4.5	5.1	4.9	
Provincial	3.1	3.6	3.9	4.4	4.1	4.7	4.7	5.3	5.2	4.9	
Local	5.8	5.7	6.1	5.0	5.3	5.3	5.1	5.4	5.6	5.4	
Ontario	11.1	11.8	12.9	11.9	12.6	12.5	12.1	13.1	12.3	12.0	
Province	3.9	3.5	3.9	4.4	4.2	4.0	3.8	4.2	3.8	4.0	
Local	7.1	8.3	9.0	7.5	8.4	8.5	8.2	8.9	8.5	8.1	
Culture as a Percentage of Recreation and Culture Expenditure											
Tri-Level	29.1	27.3	28.7	26.5	27.0	28.2	29.4	30.1	31.1	30.6	
Federal	29.7	34.6	46.0	46.7	43.8	52.5	56.8	53.8	58.5	56.9	
Provincial	35.7	33.8	32.6	30.7	31.8	31.0	32.5	34.8	37.9	36.0	
Local	26.3	21.9	21.6	17.6	19.4	18.6	18.5	20.0	19.5	19.7	
Ontario	--	--	--	--	--	--	--	--	--	--	
Province	48.7	40.5	45.3	42.2	35.3	30.5	29.5	35.5	35.6	39.5	
Local	27.1	27.4	27.6	23.2	38.3	26.5	26.9	30.8	30.6	30.5	

Source: Tri-Level Cultural Expenditure Data Base, Research and Evaluation, Canada Council, June 1986

FIGURE 1: Average Annual Percentage Growth

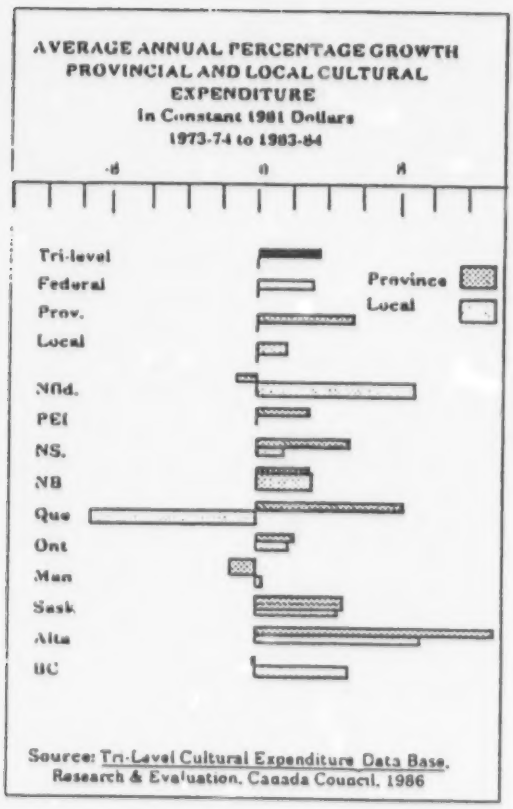
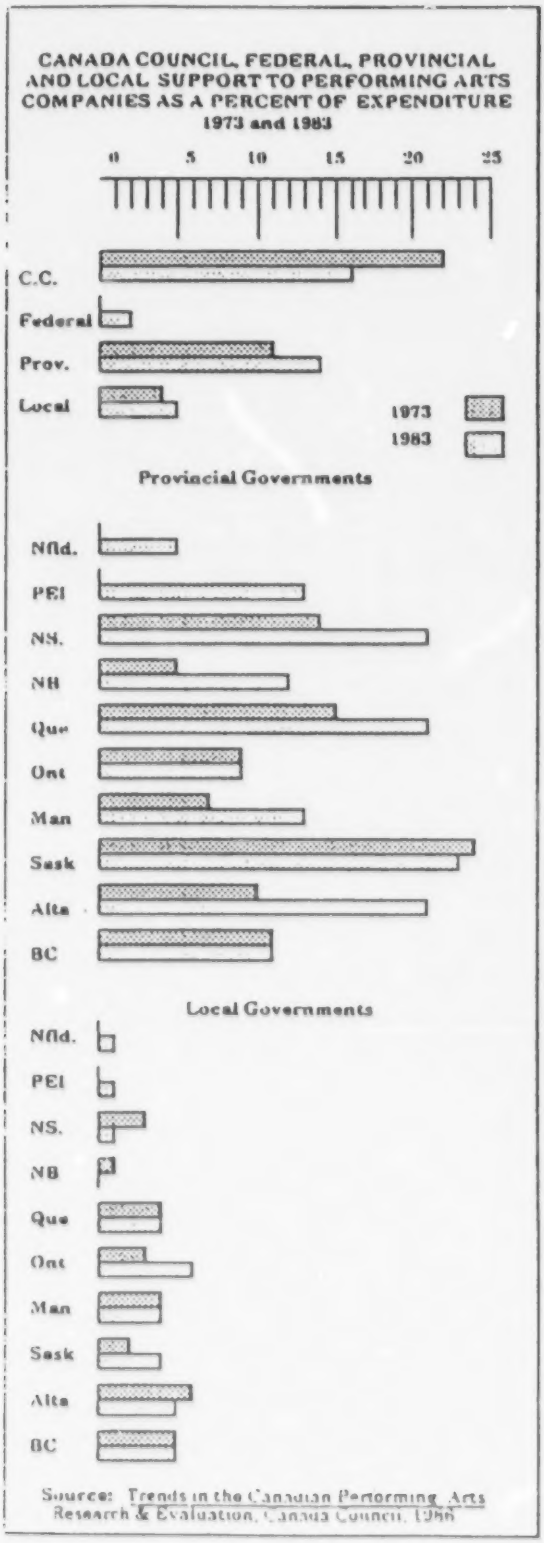


FIGURE 2: Canada Council, Federal Provincial and Local Support to Performing Arts Companies as a Percent of Expenditure



Source: Trends in the Canadian Performing Arts Research & Evaluation, Canada Council, 1986

TABLE 2: Federal Government Expenditures on Culture, 1984 - 85 ($000's)

Sector	ONTARIO			CANADA
	Operating	Capital	Total	
Libraries	10,575	323	10,898	30,237
Heritage Resources	146,659	40,493	187,152	435,547
Literary Arts	7,694	314	8,008	249,455
Performing Arts	43,165	1,467	44,632	76,128
Visual Arts and Crafts	4,007	270	4,277	10,933
Film and Video	39,432	149	39,581	131,277
Broadcasting	494,154	26,921	521,075	1,179,702
Sound Recording	89		89	260
Multi-Culturalism	12,031	89	12,120	26,375
Multi-Disciplinary	20,572	667	21,239	68,640
Other	9,168	22	9,190	12,933

Source: Statistics Canada 87-206

TABLE 3: Canada Council Arts Funding In Ontario, 1984 - 85 ($000's)

	Support to Artists	Support to Organizations	Total
Dance	207	4,045	4,252
Music	373	4,445	4,818
Theatre	192	4,383	4,575
Visual Arts	1,636	1,885	3,521
Media Arts	155	1,112	1,267
Writing	485	3,205	3,690
Other	166	110	276
Explorations		776	776
Total	3,214	19,961	23,175

TABLE 4: Canada Council Arts Support to Artists and Organizations by Discipline

	Support to Artists	Support to Organizations	% Total
Dance	6.4 %	20.2 %	18.3 %
Music	11.6 %	22.3 %	20.8 %
Theatre	6.0 %	22.0 %	19.7 %
Visual Arts	50.9 %	9.4 %	15.2 %
Media Arts	4.8 %	5.6 %	5.5 %
Writing	15.1 %	16.1 %	15.9 %
Other	5.2 %	0.6 %	1.2 %
Explorations		3.9 %	3.3 %
Total	100.0 %	100.0 %	100.0 %

TABLE 5: Canada Council Support to Artistic Communities, 1984 - 85

ONTARIO	$000's	%
Arts Centres	128	0.6 %
Literary Arts	2,758	13.6 %
Media Arts	397	0.2 %
Performing Arts	15,105	74.6 %
Visual Arts	1,863	9.2 %
Total	20,251	100.0 %

TORONTO	$000's	%
Arts Centres	128	0.9 %
Literary Arts	2,139	14.7 %
Media Arts	329	2.3 %
Performing Arts	10,990	75.7 %
Visual Arts	940	6.5 %
Total	14,526	100.0 %

lions i.e. 0.5 per cent. While the percentage of gross general expenditure has changed little over the years, in real terms provincial spending on culture has risen slightly since the early 1970s. Among the provinces, Alberta, followed by Quebec, increased support to culture more rapidly than other provinces. In fact, the provincial governments of Manitoba, Newfoundland and British Columbia decreased support, as measured by the average annual growth in constant dollar cultural support (Fig. 1).

Local government expenditures on culture in Ontario amounted to $238.0 millions or 1.8 per cent of a gross expenditure of $12,869.4 millions. This represents a slight rise in real expenditure since the early 1970s as well as a slight increase in the proportion of general expenditure devoted to culture (Fig. 2). Again, Ontario is approximately average among provinces in these trends. Overall, in 1982-83, 27.7 per cent of governmental cultural expenditures in Ontario were made by the federal government, 36.2 per cent by the provincial government, and 36.2 per cent by local government.

FEDERAL FUNDING BY SECTOR

An indication of the distribution of federal support for the arts by cultural sector can be gained from the preliminary statistics released by Statistics Canada (1987) for the year 1984-85. The report contains data on both operating and capital expenditures as well as other contributions and transfers. The data are summarized in Table 2. These data include broadcasting, which is missing from the preceding data, but it also includes the broad categories of heritage resources (museums, archives, parks, etc.) and multiculturalism.

It can be seen that on this definition of culture, Ontario received 38.6 per cent of federal cultural support. The data also reveal the great importance of federal cultural support for broadcasting. Another way of viewing federal government expenditures on culture is through the disbursement of Canada Council funds which made up 93.4 per cent of federal government spending on culture in 1983. Their expenditive groupings are somewhat different to those just reported. However, they do distinguish between support given to individuals and that given to organizations, the latter making up by far the largest proportion of the total.

In 1983, Ontario received 39.1 per cent of all Canada Coun cil support, and almost three-quarters (71.7 per cent) of this was concentrated in Toronto. The disbursement of funds was fairly evenly distributed across the music, theatre, dance, writing and visual arts categories (Table 3). However, when grouped in another way, it is evident that the performing arts are the major beneficiaries (Tables 4 and 5).

PROVINCIAL FUNDING BY SECTOR

Similar data to those which are available on federal spending on

TABLE 6: Provincial Government Expenditures on Culture, 1985 - 85

	ONTARIO		
Sector	Operating	Capital	Total
Libraries	438,109	5,787	443,896
Heritage Resources	218,112	70,096	288,208
Arts Education	32,604	622	33,226
Literary Arts	11,102	54	11,156
Performing Arts	85,364	26,389	111,753
Visual Arts and Crafts	15,639	1,030	16,669
Film and Video	16,179	182	16,361
Broadcasting	123,824	10,814	134,638
Sound Recording	1,474	--	1,474
Multi-Culturalism	31,858	5,994	37,852
Other	45,094	9,995	55,089
Total	1,019,359	130,963	1,150,322

Source: Statistics Canada 87-206

TABLE 7: Ontario Municipal Government Expenditures on Culture, 1984 ($000's)

Libraries*	217,099
Museums	3,934
Public Archives	54
Performing Arts	28,140
Other	29,786
Total	279,013

* Includes expenditures for school libraries

Source: Statistics Canada 87-206

culture are also available on provincial expenditures. Information on provincial government expenditures on culture is presented in Table 6. It can be seen that the provincial spending differs from that of the federal government with by far the largest item being expenditures on libraries. However, only 22.9 per cent of library spending is devoted to public libraries.

MUNICIPAL EXPENDITURES BY SECTOR

Data on municipal expenditures on the arts are much less easily obtained. Furthermore, estimates differ markedly depending upon the source. The data included in Table 7 suggest that, as in the case of provincial spending, libraries, including school libraries, are the major beneficiaries.

PRIVATE SUPPORT

A second source of support for the arts is gained through private donations and other private support, including industry fund-raising activities. In 1983 private support stood at approximately $5.8 millions ($2.707 millions in 1971 constant dollars) and constituted 14 per cent of the support received by performing arts organizations in Ontario who were also funded by the Canada Council.

The most recent information on corporate donations to the arts is that in a 1986 survey conducted by the Council for Business and the Arts in Canada (CBAC 1986). The CBAC reported that 65 of their members (54 per cent of their membership) made $71,431,000 in corporate donations in Canada of which 12.5 per cent was directed to arts and culture. The major beneficiaries of these donations were music (30 per cent), theatre (22.3 per cent), museums (16.2 per cent), dance (8.6 per cent), galleries (6.8 per cent), opera (6.3 per cent) and other (9.8 per cent). The average annual arts donation per member has risen over the years and is now approximately $140,000. The CBAC has also compiled detailed information on the finances of the arts organizations which it supports.

Separate reports are available for 1985-86 for performing arts and visual arts organizations. The 53 performing arts organizations from Ontario together had a total operating revenue of $88,181,478 and they spent $88,295,575 for a deficit of ($114,097). The revenue was made up as follows: total box office and earned $49,564,975, total government grants $26,443,311 and private donations $12,173,192.

Of the organizations from across the country mentioned in the report, 44.0 per cent of total operating revenue occurred in Ontario, 44.5 per cent of expenditures were made in Ontario, 46.7 per cent of earned revenues accrued, 40.0 per cent of government grants were received and 50.9 of private donations were received. These organizations attracted a combined audience of 3,030,079 plus an additional 1,591,417 when on tour,

TABLE 8: Trends in the Canadian Performing Arts

All Disciplines

	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983
I - ACTIVITIES	No.	No.	No.	No.	No.	No.	No.	No.	No.	No.	No.	No.
1 - REPORTING CO.'S	11	15	15	24	25	59	58	63	67	68	71	70
2 - PERFORMANCES	2,878	4,042	3,783	4,967	4,717	6,697	7,408	8,058	8,687	8,725	9,005	8,507
a) Home	1,160	2,746	2,142	3,253	3,045	4,104	5,151	5,252	5,250	5,505	5,626	5,658
b) Tour	389	1,089	1,059	909	1,120	1,941	1,885	2,415	3,101	2,772	2,686	1,972
c) Other	1,329	477	582	805	552	652	372	391	336	448	693	877
d) Children	219	1,220	933	930	533	2,068	2,555	2,395	2,901	2,535	3,133	2,246
3 - SPECTATORS(000)	1,949	2,560	2,417	2,912	2,693	3,017	3,186	3,225	3,384	3,360	3,470	3,425
a) Home	992	1,423	1,581	1,947	1,793	2,041	2,348	2,451	2,405	2,428	2,476	2,566
b) Tour	366	898	644	552	552	699	811	745	937	881	842	738
c) Other	591	240	193	412	347	277	28	29	42	51	152	121
d) Children	136	480	312	532	191	601	711	574	713	667	816	695
II - FINANCES	$000's	$000's	$000's	$000's	$000's	$000's	$000's	$000's	$000's	$000's	$000's	$000's
1 - REVENUE	10,231	12,110	11,745	12,540	12,947	14,825	16,440	16,348	16,865	16,339	17,245	18,764
a) Earned	5,720	7,105	6,492	6,877	6,914	7,409	8,600	8,765	8,974	8,641	9,242	10,380
Box Office	5,506	6,798	6,160	6,350	6,529	6,975	7,948	7,976	8,333	7,744	8,255	9,431
Other Earned	214	308	332	527	385	434	653	788	642	897	987	948
b) Private Support	1,250	1,181	1,290	1,545	1,604	1,952	1,918	1,882	2,446	2,427	2,675	2,707
Fund Raising	1,084	1,138	1,186	1,331	1,554	1,737	1,596	1,489	2,405	2,359	2,655	2,628
Other Private	166	43	104	214	50	215	322	393	40	68	20	79
c) Public Support	3,262	3,824	3,964	4,118	4,429	5,465	5,922	5,700	5,445	5,272	5,327	5,678
Canada Council	2,045	2,433	2,503	2,362	2,490	2,733	3,030	2,810	2,522	2,356	2,424	2,705
Other Federal	-	-	-	-	-	-	-	-	96	210	234	192
Provincial	914	1,047	1,090	1,279	1,474	2,042	2,043	1,946	1,819	1,721	1,635	1,704
Municipal	303	343	371	477	465	690	834	923	987	930	941	1,056
Other Public	-	-	-	-	-	-	15	21	21	55	93	21

TABLE 8: Trends in the Canadian Performing Arts

All Disciplines

	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983
2 - EXPENDITURE	10,831	12,205	12,121	12,977	12,450	14,595	16,896	17,027	16,647	16,463	17,086	19,131
a) Production	7,316	8,281	8,400	8,903	8,259	9,561	11,429	11,300	10,974	10,274	10,694	11,535
Artistic Pers.	5,252	5,609	5,187	5,450	5,063	5,992	7,116	7,174	7,121	6,480	6,853	7,324
Technical Pers.	1,238	1,289	1,237	1,757	1,701	1,595	1,691	2,019	2,220	2,072	2,475	2,687
Royalties	120	95	77	163	99	168	150	280	217	242	229	289
Other Expenses	706	1,287	1,899	1,533	1,397	1,806	2,473	1,826	1,416	1,480	1,137	1,236
b) Promotion & Pub.	1,076	1,070	1,065	1,226	1,233	1,440	1,736	1,792	1,757	2,013	2,090	2,519
P & P Pers.	41	203	186	179	242	292	292	292	312	314	345	393
P & P Other	1,035	867	879	1,047	991	1,148	1,444	1,500	1,444	1,700	1,745	2,125
c) Administration	1,111	1,300	1,244	1,459	1,692	1,916	1,748	2,056	2,009	2,193	2,301	2,650
Admin. Pers.	514	614	688	738	909	1,186	1,042	948	1,037	1,105	1,174	1,368
Other Admin.	597	686	556	722	783	730	707	1,109	973	1,088	1,127	1,282
d) Other	1,327	1,554	1,412	1,388	1,266	1,679	1,982	1,879	1,907	1,982	2,001	2,428
Space Costs	794	752	692	789	690	891	895	941	1,053	1,021	1,026	1,353
Util & Main.	109	127	340	158	86	146	154	153	201	215	207	216
Other Pers.	260	675	380	432	319	365	376	530	456	493	489	513
Other Expenses	164	-	-	10	171	277	557	255	197	252	279	346
3 - DEFICIT	600	95	375	437	(497)	(230)	455	679	(218)	124	(159)	367
III - RATIOS												
1. EFFECTIVENESS												
a) Co. Size	$930,104	$807,362	$783,031	$522,501	$517,882	$251,274	$283,453	$259,485	$251,713	$240,280	$245,885	$268,060
b) Spect./perf.	$677	$633	$639	$586	$571	$450	$430	$400	$390	$385	$385	$403
c) Cost/Perf.	$3,763	$3,020	$3,204	$2,613	$2,639	$2,179	$2,281	$2,113	$1,916	$1,887	$1,897	$2,249
d) Cost/Spect.	$5.56	$4.77	$5.01	$4.46	$4.62	$4.84	$5.30	$5.28	$4.92	$4.90	$4.92	$5.59
e) B.O./Spect.	$2.82	$2.66	$2.55	$2.18	$2.42	$2.31	$2.49	$2.47	$2.46	$2.30	$2.38	$2.75
f) Private/Spect.	$0.64	$0.46	$0.53	$0.53	$0.60	$0.65	$0.60	$0.58	$0.72	$0.72	$0.77	$0.79
g) Public/Spect.	$1.67	$1.49	$1.64	$1.41	$1.65	$1.81	$1.86	$1.77	$1.61	$1.57	$1.54	$1.66
2. FINANCIAL												
a) Income Gap	47 %	42 %	46 %	47 %	44 %	49 %	49 %	49 %	46 %	48 %	46 %	46 %
b) Subsidy	30 %	31 %	33 %	32 %	36 %	37 %	35 %	33 %	33 %	32 %	31 %	30 %
c) Leverage	$3.32	$3.19	$3.06	$3.15	$2.81	$2.67	$2.85	$2.99	$3.06	$3.12	$3.21	$3.37

TABLE 9: Trends in the Canadian Performing Arts

All Disciplines

	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983
I - ACTIVITIES	%	%	%	%	%	%	%	%	%	%	%	%
1 - REPORTING CO.'S	100	100	100	100	100	100	100	100	100	100	100	100
2 - PERFORMANCES	100	100	100	100	100	100	100	100	100	100	100	100
a) Home	40	61	57	65	65	61	70	65	60	63	62	67
b) Tour	14	27	28	18	24	29	25	30	36	32	30	23
c) Other	46	12	15	16	12	10	5	5	4	5	8	10
d) Children	8	30	25	19	11	31	34	30	33	29	35	26
3 - SPECTATORS(000)	100	100	100	100	100	100	100	100	100	100	100	100
a) Home	51	56	65	67	67	68	74	76	71	72	71	75
b) Tour	19	35	27	19	21	23	25	23	28	26	24	22
c) Other	30	9	8	14	13	9	1	1	1	2	4	4
d) Children	7	19	13	18	7	20	22	18	21	20	24	20
II - FINANCES	%	%	%	%	%	%	%	%	%	%	%	%
1 - REVENUE	94	99	97	97	104	102	97	96	101	99	101	98
a) Earned	53	58	54	53	56	51	51	51	54	52	54	54
Box Office	51	56	51	49	52	48	47	47	50	47	48	49
Other Earned	2	3	3	4	3	3	4	5	4	5	6	5
b) Private Support	12	10	11	12	13	13	11	11	15	15	16	14
Fund Raising	10	9	10	10	12	12	9	9	14	14	16	14
Other Private	2	-	1	2	-	1	2	2	-	-	-	-
c) Public Support	30	31	33	32	36	37	35	33	33	32	31	30
Canada Council	19	20	21	18	20	19	18	17	15	14	14	14
Other Federal	-	-	-	-	-	-	-	-	-	-	-	-
Provincial	8	9	9	10	12	14	12	11	11	10	10	9
Municipal	3	3	3	4	4	5	5	5	6	6	6	6
Other Public	-	-	-	-	-	-	-	-	-	-	-	-
2 - EXPENDITURE	100	100	100	100	100	100	100	100	100	100	100	100
a) Production	68	68	69	69	66	66	68	66	66	62	63	60
Artistic Pers.	48	46	43	42	41	41	42	42	43	39	40	38
Technical Pers.	11	11	10	14	14	11	10	12	13	13	14	14
Royalties	1	1	1	1	1	1	1	2	1	1	1	2
Other Expenses	7	11	16	12	11	12	15	11	9	9	7	6
b) Promotion & Pub.	10	9	9	9	10	10	10	11	11	12	12	13
P & P Pers.	-	2	2	1	2	2	2	2	2	2	2	2
P & P Other	10	7	7	8	8	8	9	9	9	10	10	12
c) Administration	10	11	10	11	14	13	10	12	12	13	13	14
Admin. Pers.	5	5	6	6	7	8	6	6	6	7	7	7
Other Admin.	6	6	5	6	6	5	4	7	6	7	6	7
d) Other	12	13	12	11	10	12	12	11	11	12	12	13
Space Costs	7	6	6	6	6	6	5	6	6	6	6	7
Util & Main.	1	1	3	1	1	1	1	1	1	1	1	1
Other Pers.	2	6	3	3	3	2	2	3	3	3	3	3
Other Expenses	2	-	-	-	1	2	3	1	1	2	2	2
3 - DEFICIT	6	1	3	3	(4)	(2)	3	4	(1)	1	(1)	2

Figures may not add due to rounding.

representing 41.6 per cent and 45.7 per cent of their respective national audiences.

Of the 20 largest performing arts organizations in the country, 5 of the largest, as measured by revenues (the Stratford Festival, the Canadian Opera Company, the Toronto Symphony, the National Ballet and the Shaw Festival) are based in Ontario. Similar information is available on public art galleries, public museums and university affiliated art galleries and museums. For example, the 18 public art galleries in the 1985-86 survey reported a total of $1,391,529 in private donations out of a total revenue of $27,659,861. The evidence is clear that galleries and museums depend less on private donations and more on government funding than performing arts organizations which are more successful in attracting corporate donations.

EARNED INCOME

In addition to government revenue and private donations, arts organizations earn income through the box office, royalties and in other ways. The CBAC provides information on earned income for those member organizations responding to its survey. However, this is not a complete record of all organizations which come under the jurisdiction of the Ontario Arts Council.

In fact, it is difficult to go much beyond the income data which the Canada Council has presented for the performing arts. They suggest that those professional arts organizations funded by the Canada Council generated an earned income of $10,380,000 in 1983 of which 90.9 per cent was from box office receipts. Earned income constituted 55.3 per cent of revenues for these organizations in 1983.

SUMMARY

The revenues of arts organizations come from three major sources: government at various levels, private donations and earned income. The most complete information on finances at the provincial level is available for performing arts organizations. However, these data only refer to organizations funded by the Canada Council. These data are presented in Table 8 in 1971 constant dollars and in percentage form in Table 9. These data show that, of a total revenue of $18,764,000 (in 1971 constant dollars) in 1983, 55 per cent was earned, 30 per cent came from gov ernment sources and 14 per cent came from private donations.

The Canada Council figures are extremely conservative. Unpublished data for the year 1984-85 for 144 Ontario-based performing arts organizations indicate a total income of $94,052,511 of which 50.8 per cent came from earned revenue, and 32.7 per cent from grants. Comparative figures for art galleries reveal a total budget of approximately $10 million of which 13.3 per cent came from earned revenue, 14.9 per cent from fund raising, 12.1 per cent from other

revenue, and 40.3 per cent from grants.

EXPENDITURES

The revenues which have been reported constitute the incomes of arts organizations and, in some cases, individual artists. These revenues are injected into the Ontario economy when they are spent. The needs of arts organizations are extremely diverse: they employ artists and administrators, they pay royalties, they rent buildings and other space and they have all of the usual expenses of a business operation.

Thus, the revenues which are generated are returned to the provincial economy where they contribute to the incomes of other Ontario residents. Of course, the expenditure patterns of different organizations will vary and not all expenditures will necessarily take place within the provincial economy, particularly if artists are hired from abroad or the company tours. This means that it is extremely difficult to describe the expenditure patterns of arts organizations as a group and data are not presently available to make this possible.

Once again, it is necessary to illustrate by example and to fall back upon the detailed information prepared by the Canada Council on performing arts organizations. As in the case of revenues, considerable information is available on the expenditures of those performing arts organizations which are supported by the Canada Council. This information is summarized in Table 8 and 9. These data indicate that a considerable proportion of expenditures is in the form of salaries to artists (38 per cent), technicians (14 per cent), and administrative (7 per cent), promotional (2 per cent) and other employees (3 per cent). The remainder (36 per cent) is spent in a great diversity of ways.

CONCLUSIONS

Artistic activity in Canada and Ontario relies to a considerable extent upon funding from all three levels of government. Funding from the federal government is an injection of "new money" into the Ontario economy. The great majority of the revenues of arts organizations are spent in the provincial economy where they generate further rounds of spending which are known as indirect and induced impacts and which are the subject of the following two sections of this report. While, at first sight, the magnitude of governmental support for culture, of which the arts is a part, may appear to be large, it constitutes only a small proportion of public spending (9.4 per cent of federal, 0.5 per cent of provincial, and 1.8 per cent of local government expenditure). Ontario is approximately average among provinces in per capita support for the arts but it has a disproportionately large proportion of artistic activity.

INDIRECT IMPACTS

Indirect benefits have been defined as "the ripple effect through the economy of successive rounds of spending associated with the original organization or its patrons" (Wall and Brown, 1983). Thus, when artists, arts organizations or patrons of the arts spend money, some of this money may become income to others and the impact of the original expenditure is multiplied. These impacts are often measured using multiplier analysis. Unfortunately, data are not available to undertake sophisticated multiplier analysis although the results of the Canada Council's multiplier analyses are presented in the concluding chapter.

The objectives of this chapter are more modest. In this section, two forms of indirect impacts will be examined:

1. the expenditures of artists;
2. the expenditures of artsgoers as a by-product of attendance at arts events.

The expenditures of arts organizations have been discussed briefly in the preceding section and they will not be considered in detail in this section. However, they are incorporated in the Canada Council statistics in the concluding chapter.

THE EXPENDITURES OF ARTISTS

It might be supposed that a combination of the expenditures of artistic organizations coupled with the expenditures of individual artists would provide a good estimate of the volume of expenditures flowing from the arts into the Canadian economy. It is true that the majority of both government and corporate support for the arts is directed to artistic organizations. However, a complete census of the finances of artistic organizations is not available. Furthermore, while some artists work totally independently, many receive much of their income through arts organizations so that any attempt to combine the two measures would result in double counting. Removal of salaries from the artistic organizations' budgets would improve matters but would not eliminate the problem. Organization incomes and expenditures, and artists' incomes and expenditures are best regarded as overlapping but separate indicators of artistic activity.

The precise number of people employed in the arts in Ontario varies with the definition of the arts, the date of investigation, and whether one is concerned with the arts industry or the arts labour force. (See section on employment). Eleven sectors are included in the arts industry, each of which involves the extensive use and application of artistic skills or the sale of artistic goods and services. Only a third of the arts labour force is actually employed in the arts industry

TABLE 1: Total Wages and Salaries of Adult Working Arts Labour Force in Ontario, 1981

	# Employed	Average	Total
Architects & Engineers	1,770	22,721	40,216,170
Library, Museum & Archival Sciences	3,020	14,638	44,206,760
Other Teaching & Related Occupations	5,585	9,414	52,577,190
Fine & Commercial Art, Photography & Related	17,295	13,103	226,616,385
Performing & Audio-Visual Arts	11,840	14,184	167,938,560
Writing	13,250	17,653	233,902,250
Printing and Related	28,860	14,802	427,185,720
Electronic & Related Communic. Equip., n.e.c.	3,010	16,626	50,044,260
Other Crafts & Equipment	3,790	12,820	48,587,800
Total	88,420		1,291,275,095

Table 2: Expenditures of Ontario Residents and Artists

	Average Annual Family Expenditures 1982, %	Artists Expenditures $ million
Food	15.0	205
Prepared at home	11.2	153
In restaurants	3.7	50
Shelter	17.8	243
Rented Quarters	4.6	63
Owned Quarters	8.8	120
Mortgage Interest	4.2	57
Water, Fuel and Electricity	3.4	46
Household Furnishings and Equip.	3.6	49
Household Furnishings	1.8	25
Household Equip.	1.5	20
Household Operation	4.5	61
Communications	1.4	19
Child Care	0.6	8
Clothing	5.9	81
Personal Care	1.8	25
Medical Care and Health Care	2.1	29
Insurance Premiums	0.9	12
Dental Care	0.4	5
Prescribed Medicines	0.2	3
Tobacco and Alcohol	3.4	46
Tobacco Products and Supplies	1.3	17
Alcoholic Beverages	2.0	27
Transportation	11.7	159
Purchase of Automobiles and Trucks	3.3	45
Automotive Fuels	3.4	46
Local and Commuter Transit	0.5	7
Recreation	4.4	60
Outdoor Recreation	1.2	16
Home Entertainment	0.9	12
Reading Materials	0.6	8
Education	0.7	10
Tuition Fees	0.5	7
Miscellaneous	3.0	41
Interest on Personal Loans	1.1	15
Government Lottery Tickets	0.4	5
Personal Taxes	18.0	245
Security	4.1	55
Life Insurance Premiums	0.7	10
Unemployment Insurance	1.0	14
Gifts and Contributions	3.5	47
Total Expenditures	100.0	1.364

Table 3: Selected Expenditures of 43 Toronto Symphony Musicians ($)

	Toronto	Elsewhere	Total
Purchase of instruments	72.904	67.296	140.200
Maintenance of instruments	15.006	3.294	18.301
Lease of instruments	260	260	520
Purchase of music	5.424	3.051	8.475
Insurance of instruments	5.798	716	6.514
Rental of tuxedo	5.019	3.051	8.070
Totals	104.411	77.668	182.079

Source: Wall and Mitchell, 1984.

(Canada Council, 1984). In addition to the arts labour force there are two other distinct kinds of arts-related occupations in the arts industry. These include arts administrators and all other non-arts occupations in the arts industry e.g. truck drivers and other support staff.

The data in Table 1 refer to the arts labour force in 1981 and are derived from census data for 1981. The data are conservative in that they refer to the wages and salaries rather than the total incomes of arts employees. The table indicates considerable differences in average salaries between artistic sectors and suggests a total wages and salaries bill in excess of $1,360 million.

If it is assumed that artists spend their incomes in much the same way as other Ontario residents, then it is possible to estimate the disbursement of this income into the Ontario economy. The expenditure patterns of Ontario residents in 1980 is indicated in Table 2 (Ontario, Ministry of Treasury and Economics, 1986). When this information is linked with that on the wages and salaries of the arts labour force, it can be seen that their spending penetrates all sectors of the economy.

Some cautionary notes are in order concerning the validity of these tables, for artists are not typical Ontarians. They tend to be disproportionately well-educated, female, young, with below average incomes, and they are not evenly distributed across the province. It follows that their expenditure patterns may diverge somewhat from those of the average Ontarian. Nevertheless, we believe that the figures are useful in indicating the orders of magnitude involved.

Of course, many artists must make a variety of specific expenditures as a consequence of the practice of their art. They may need to purchase raw materials or the "tools of their trade" and many are required to travel a great deal. Such requirements give rise to specialized businesses, such as music shops, which are designed to cater to these needs. Unfortunately no systematic information is available on the nature of these needs or their associated expenditures so that an overall assessment of their magnitude or implications is not possible. However it is possible to illustrate the kinds of expenditures which may be involved through a consideration of the expenditures of professional musicians.

Investigations of the expenditures of Toronto Symphony and Kitchener-Waterloo Symphony musicians on items associated with performing indicated that the former have annual expenditures averaging $4,234 of which $2,428 were spent in Toronto and $1,806 was spent elsewhere (Table 3) (Wall and Mitchell, 1984). Similarly, in the Kitchener-Waterloo case, the figures were $1,586, $544 and $1,042 respectively. While no claim is made that these figures are typical (in fact there are major differences between Toronto and Kitchener-Waterloo musicians),

TABLE 4: Average Expenditure per Visitor ($)

	Toronto Residence		Out-of-Town Day		Out-of-Town Overnight	
	King Tut	Van Gogh	King Tut	Van Gogh	King Tut	Van Gogh
Food	4.36	5.22	9.08	7.93	18.59	60.41
Accommodation					10.48	42.39
Entertainment	0.08	0.15	0.03	0.29	3.22	20.31
Tourist Attractions	0.06	3.47	0.67	3.68	1.16	3.91
Transportation	2.26	0.62	5.01	5.38	17.08	23.61
Exhibit Souvenirs	12.99	1.89	17.66	3.24	32.17	4.19
Other Purchases	1.39	1.74	4.97	2.79	24.76	19.08
Total of Above	21.14	13.09	37.42	23.31	107.46	173.9
All Expenditures	9.55	10.15	27.32	21.29	100.86	148.28

Table 5: Per Capita Expenditures of Visitors at Selected Festivals ($)

	Blyth	Elora	Niagara-on-the-Lake	Stratford
Accommodation	0.71	1.68	29.49	30.79
Gifts/Souvenirs	1.17	0.94	10.08	12.30
Food	2.62	6.08	29.24	31.75
Gas	0.85	0.46	2.04	4.14
Crafts/Antiques	0.49	1.00	2.59	4.18
Entertainment	0.07	0.03	0.47	1.03
Clothing	2.37	0.91	3.82	1.83
Groceries	0.37	0.27	1.25	1.83
Books	0.10	0.26	.80	2.80
Other	0.02	0.04	0.05	0.83
Total	8.79	11.67	79.83	97.14

Source: Mitchell and Wall, 1985

Table 6: Per Capita Expenditures of Audience Members at Selected Symphony Concerts ($)

	Toronto	Kitchener-Waterloo
Travel	0.98	0.13
Babysitter	0.29	0.38
Records	0.45	----
Refreshments	0.80	0.63
Meal	11.30	3.14
Parking	1.70	0.85
Accommodation	2.85	----
Souvenirs	0.56	0.18
Total	18.93	5.15

Source: Wall and Mitchell, 1984

the cumulative impact of the large number of artists across the province must be substantial.

ART-GOERS' EXPENDITURES

As a by-product of their attendance of arts events, members of the audience spend money on a wide variety of purchases. These may include transportation, food, accommodation, babysitting, parking fees and souvenirs. Some of these expenditures would occur in the absence of attendance at arts events and only the location of expenditures has changed. In other cases, as in the case of tourists visiting from outside the province to participate in artistic activities, such expenditures may be an injection of new money into the provincial economy.

Unfortunately, information on such expenditures is sparse and scattered and there is no simple way to measure their magnitude. This does not mean they are not important. In the absence of detailed information on such expenditures at the provincial level, it is necessary to illustrate the na ture of these expenditures and their magnitudes by example. Average ex penditures per visitor to the Tutankhamun and Van Gogh exhibitions at the Art Gallery of Ontario in Toronto are presented in Table 4. Similar expenditure statistics are shown in Table 5 for selected festival visitors and in Table 6 for those attending concerts of the Toronto and Kitchener-Waterloo symphony orchestras.

Individually, the expenditures may appear to be quite small, but when the large number of arts patrons is considered, it can be seen that the cumulative impact of these expenditures is substantial. In so far as visitors have come from outside of the local community to partake of an artistic event, those events can be regarded as tourist attractions. However, the exact links between the arts and tourism have yet to be established clearly. Abt Associates (1986) have made a good start by pulling together some of the case studies on special events but it is also likely that some facilities and organizations attract tourists as a normal part of their activities.

For example, the Canadian Tourism Attitude and Motivation Study (1986), which investigated the vacation patterns of Canadians, found that 9 per cent of Canadians could be classified under a "city culture" heading, and an additional 8 per cent under heritage, in terms of the activities and interests desired on their vacations. The Ontario Travel Survey of 1982 (Ontario Ministry of Tourism and Recreation, 1985) indicated that 7.1 per cent of all day visitors to Toronto attended live theatre, dance or music, 1.9 per cent museums or galleries, 1.3 per cent an historical site, and 9.7 per cent exhibitions, fairs or special events. The comparable figure for sport was 4.4 per cent.

If the focus is changed to visitors to Toronto who stayed at least one night, then the proportions rise to

14.7 per cent, 5.6 per cent, 4.1 per cent and 13.5 per cent respectively with sport increasing to 6.1 per cent. Somewhat similarly, data from the 1986 visitor survey of the Metro Toronto Convention and Visitors Association (personal communication, K. Buleychuk) indicate that 12.3 per cent of visitors stated that their main purpose for a trip to Toronto was to participate in cultural activities. Among convention visitors, 10.7 per cent stated that they would participate in cultural activities before the convention they were attending began and 5.8 per cent commented that they would participate in cultural activities after the convention they were attending had finished. Among business visitors and other tourists, 18.5 per cent stated that they would participate in cultural activities while in Toronto.

The Royal Ontario Museum and the Art Gallery of Ontario were visited by 17.3 per cent and 13.2 per cent of visitors to Toronto respectively. The 1985 Ontario Exit Survey (Ministry of Tourism and Recreation, 1987), which is concerned with the activities of visitors to Canada, found that 2.7 per cent of such visitors went to live theatre, dance or music concerts at their main destination, 6.6 per cent went to museums or galleries, 5.0 per cent attended exhibitions, fairs or special events, 10.4 per cent went to historical sites and 3.2 per cent went to a sporting event. Of course, the foreign tourist is much more important at specific sites, such as Niagara-on-the-Lake and Stratford, than is indicated by these general statistics. Federal government tourism marketing strategies directed towards the American visitor have recently moved away from a reliance upon moose, mountains and mounties to incorporate the vibrant cultural life of Canadian cities.

SUMMARY

This chapter has been concerned with the indirect economic impacts of artistic activities. It has been shown that the wages and salaries earned by the arts labour force are spent in the provincial economy in ways which are generally similar to those of people in other categories of employment, and also in ways specific to the various arts sectors. These wages and salaries thus, ultimately, are passed on to other sectors of the economy. In addition patrons of artistic activities often incur a variety of other expenses as a byproduct of their involvement in the arts. These, too, are directed into other economic sectors.

In many cases, patrons of the arts may be tourists, so that some proportion of tourist expenditures is attributable to the availablity of artistic activities. It may be possible to expand the tourist season into the current shoulder seasons and off-seasons when many of the cultural events are staged. The significance of arts and culture to tourism in the province, and the relative potential of artistic types to gain from this interaction are topics that merit much more attention than they have yet received.

INDUCED IMPACTS

Induced impacts have been defined as "changes in the business environment and property values which may be associated with an improvement in the quality of life in a community" (Wall and Brown, 1983). It has been frequently stated, but seldom proved, that businesses are attracted to places with a high-quality environment, including the availability of high quality artistic and cultural facilities. Similarly, it is commonly stated that business activity of all types thrives in areas with rich artistic offerings. Also it has been suggested that the development of an active arts sector can help to revive decaying downtown cores and encourage residents to return to and upgrade inner city areas. Such possibilities have economic aspects and implications but are difficult to substantiate in quantitative terms, particularly at the provincial level. In the absence of such information it is necessary to turn to the only study of which we are aware which attempts to support the preceding claims with data and analyses: the examination of the impacts of selected Ontario festivals by Mitchell and Wall (1986).

Two strategies were employed to gain information on the induced impacts of festivals at Blyth, Elora, Niagara-on-the-Lake and Stratford. First, Dun and Bradstreet Reference Directories were used to trace the business history of each community at five year intervals from 1941 to 1985 to see if the business composition of the community changed following the establishment of the festival. Second, information was gathered from interviews with local business proprietors to ascertain the influence of the festival upon their business decisions.

DUN AND BRADSTREET ANALYSIS

In the smaller towns (Elora and Blyth), the pre-festival period was characterized by declines in the numbers of retail and service establishments. During the period following the initiation of the festival, however, the numbers of retail and service establishments increased. In contrast, the pre-festival period for Stratford and Niagara-on-the-Lake was characterized by growth.

The post-festival period in Niagara-on-the-Lake witnessed a continuation of this trend with a considerable increase in the number of retail and service outlets. Similar increases were noted in the service sector in Stratford, but there was little change in the number of retail establishments.

Trends were also noted in types of businesses in the retail and service sectors. In all cases declines occurred in total numbers of services catering to the local population (e.g. shoe repair and undertaker). These declines, however, were offset by significant increases in numbers of accommodation and dining facilities. In Stratford, for example, numbers of hotels and motels increased from 7 in 1941 to 13 in 1985 and numbers of restaurants from 5 in the

TABLE 1: Business Classification

Community	Average	% Local	% Tourist	% Festival
Elora		53	47	0
Blyth		58	26	16
Stratford		80	0	21
Niagara-on-the-Lake		24	28	49

TABLE 2. Benefits Derived from the Festival (Mean Value)

Community	Average	Local	Tourist	Festival
Elora	2.9	2.2	4.4	--
Blyth	4.3	3.3	5.2	6.3
Stratford	5	4.5	--	6.9
Niagara-on-the-Lake	6.1	5.2	5.8	6.6

former year to 49 in the latter. Similar trends were observed in the retail sector and of particular significance in all cases was the prevalence of antique shops, art galleries, craft and gift stores. The development of these businesses suggests the importance of the tourist market and, by implication, the festivals. This was confirmed through the business surveys.

RESULTS OF THE BUSINESS SURVEY

Personal interviews were conducted with a representative sample of proprietors of all local businesses. Businesses were classified according to the percentage of total revenue attributed to expenditures of local patrons. Local businesses were defined as those earning less than 50 per cent of their revenue from festival patronage; tourist businesses as those which earn in excess of 50 per cent of total revenue from tourists but less than 50 per cent from festival patrons; and festival establishments as those which earn in excess of 50 per cent of all revenues from visitors to the festival. The results of this classification are presented in Table 1.

A larger proportion (49 per cent) of Niagara-on-the-Lake businesses fall into the festival category than is the case in the other communities. For example, only 16 per cent of businesses in Blyth benefit primarily from the festival, with 26 per cent relying to a greater extent on the general tourist market. There appears to be little general tourist market in Stratford. All proprietors of tourist businesses in Stratford indicated that more than 50 per cent of their revenue results from sales of merchandise to festival patrons. Hence, these businesses were classified as festival establishments. In Elora, no businesses earn in excess of 50 per cent of their revenue from the festival. This is to be expected since this event lasts for a very short period of time each year. Nevertheless, 35 per cent of all proprietors surveyed in Elora indicated that sales increased during festival week. Thus, although the impact is of a smaller magnitude, one third of all businesses benefit directly from the increased market potential created by the Elora Three Centuries Festival.

To further verify the festivals' impacts, respondents were asked "Do you feel your business benefits from the existence of the festival within the community?" Proprietors were asked to circle the appropriate number on a scale of one to seven, one indicating that the festival has only minor benefits, seven illustrating that substantial benefits are derived from the festival. Table 2 reveals that, on average, owners of festival businesses recorded higher benefit values than did proprietors of local or tourist firms. Stratford Festival proprietors felt they benefitted more than did owners of festival firms in Niagara-on-the-Lake. This may be explained by the prevalance of a general tourist market in the latter which diminishes the relative importance of the festival. However, proprietors of local firms in

TABLE 3: Extent to Which Business Decisions Were Influenced by the Festival (Mean Value)

Community	Average	Local	Tourist	Festival
Elora	--	--	--	--
Blyth	2.1	1.4	2	4.7
Stratford	2.7	1.8	--	5.9
Niagara-on-the-Lake	3.5	2.1	3.5	4.2

TABLE 4: Average Number of Summer Jobs Created per Business

Community	Average	Local	Tourist	Festival
Elora	--	--	--	--
Blyth	4.2	0.1	0.93	0.78
Stratford	1.66	0.55	--	5.9
Niagara-on-the-Lake	1.36	0.31	0.31	0.21

Niagara-on-the-Lake offered higher benefit values than did their counterparts in Stratford. Proprietors in Blyth and Elora offered considerably lower benefit values than were offered in the larger communities.

Respondents were also asked "Was your decision to open or take ownership of this establishment influenced by the existence of the festival within the community?" (Table 3). On a scale of one to seven, the mean values for each festival range from 2.1 at Blyth to 3.5 at Niagara-on-the-Lake. As found in responses to the previous question, in all cases festival businesses felt the festival was of greater importance in the decision to begin operation than either local or tourist firms. It is interesting again that proprietors of Niagara-on-the-Lake local businesses felt the festival was of greater importance in their operating decision than did proprietors of similar Stratford firms. On the other hand, festival proprietors in Stratford believed the Festival was of greater importance in their decision than did owners of these firms in Niagara-on-the-Lake. This reflects the importance of the general tourist market to the latter.

A final question was posed to verify the festivals' impacts. Proprietors were asked to provide annual and seasonal employment statistics. Table 4 indicates the average number of summer jobs created per business in each category to serve festival patrons. Figures presented in this table represent very rough approximations of employment and do not consider increases which may result in year round jobs. However, they do serve to demonstrate that the average number of summer employees who cater to festival patrons is greater for tourist and festival businesses than for local firms. This is particularly true in Stratford where 5.9 additional summer positions are created per business. This contrasts with Niagara-on-the-Lake where considerably fewer people are hired during the summer months to serve festival patrons. This again may be explained by the existence of other tourists in the community.

This discussion reveals, therefore, that significant benefits are derived from the increased market potential created by the festivals. It also has been shown that benefits are not restricted to festival or tourist businesses but extend to the local sector.

SUMMARY

Because no data are available on induced impacts at the provincial level, it was decided to illustrate the nature of induced impacts through case studies. No claim is made that the case studies are typical of the arts as a whole, or that the festivals which were chosen are representative of all festivals in the province. Nonetheless, even though the experiences of the four communities are very different, it has been documented that the existence of a vital artistic and cultural life is taken into account by businessmen in their locational decisions.

and can lead to the attraction and creation of new business and associated employment. Furthermore, the beneficiaries of the increased business are not confined to those establishments directly related to the artistic or cultural event, or tourism, but permeate all sectors of the economy.

CASE STUDIES

It has become fashionable for arts organizations to undertake studies of the economic impacts of their activities. Unfortunately, the studies have been undertaken at different times, with different objectives, and different methodologies. In consequence, the results of these studies are not additive. Nevertheless, they do provide useful information on the activities of specific organizations in specific regions. Examples of such studies which have been undertaken in Ontario include the following: investigations of the economic impacts of the Tutankhamun and Van Gogh exhibitions at the Art Gallery of Ontario, Toronto; studies of the Stratford, Shaw, Blyth and Elora Festivals and the Toronto International Festival; examinations of the Toronto and Kitchener-Waterloo symphony orchestras, and investigations of the impacts of the arts in Hamilton, Pembroke, Kingston and Sudbury regions. Some of these studies have been mentioned earlier in this report but some of their major findings are worth reiterating here.

TUTANKHAMUN EXHIBITION, ART GALLERY OF ONTARIO, TORONTO, 1979

The Tutankhamun Exhibition was visited by 800,000 people between 1 November and 31 December 1979. Of these visitors, 450,000 were members of the public who bought tickets as members of the Art Gallery, the Royal Ontario Museum and other affiliated institutions; 100,000 children came as part of school tours; 50,000 came as guests of corporate members. Not including the children, it was estimated conservatively that 18.6 per cent of all visitors came from out-of-town, stayed overnight, and spent $11 million in Toronto excluding transportation; 37.5 per cent were out-of-town day visitors who spent $6 million in Toronto excluding transportation; and 43.9 per cent of visitors were residents of Toronto who spent $3 million as a by-product of their visit to the exhibition. It follows that the Tutankhamun Exhibition resulted in at least $20 million of visitor expenditures in Toronto. The major items of expenditure in Toronto were on souvenirs and food and, for some out-of-town visitors, accommodation (Wall and Knapper, 1981).

VAN GOGH EXHIBITION, ART GALLERY OF ONTARIO, TORONTO, 1983

The "Van Gogh and the Birth of Cloisonism" exhibition was visited by 223,050 visitors, excluding school parties: a much smaller number of visitors than to the Tutankhamun Exhibition. In general, visitors to the Van Gogh Exhibition were younger, less likely to be married, more likely to be female, and were more highly educated than patrons of the King Tut Exhibition. Expenditures per visitor on souvenirs were larger at the Tutankhamun Exhibition, reflecting the greater variety of products available. However, when this item is removed, visitors to the Van Gogh Exhibition generally spent more per head than the Tutankhamun visitors. While the total impact was smaller because of the smaller number of visitors,

impacts per head were generally larger in the case of the Van Gogh Exhibition. However, no allowance was made in this comparison for inflation which would have reduced the differences. The authors concluded that the economic impacts of exhibitions are affected by the number of visitors and their socio-economic characteristics and associated spending patterns (Wall and Roberts in Hendon, Grant and Shaw, 1984).

THE TORONTO INTERNATIONAL FESTIVAL 1984

The Toronto International Festival was held in Metropolitan Toronto throughout the month of June 1984 as a part of the celebrations of the 150th anniversary of Toronto and the 200th anniversary of Ontario. It was planned as the largest music and dance festival ever to be held in Canada, with 120 different programs (197 performances) involving 3,479 performers from 14 different countries. The festival attracted between 170,000 and 270,000 visitors, of whom approximately one-quarter were from outside Toronto. Two estimates of economic impacts were calculated based upon stringent and liberal models. They suggest that the direct local economic impact was somewhere between $16.4 million and $28.4 million, with a total multiplied impact on the local economy of between $26.2 and $45.5 million (Ekos Research Associates Inc., 1984).

IMPACT OF THE ARTS ON THE HAMILTON REGION, 1985

On the basis of a survey of 75 arts organizations, it was determined that 1,487 cultural events were staged by 61 arts organizations in Hamilton-Wentworth and Burlington in one year. At the same time, 751 jobs were provided, of which 255 were full time, 385 were part-time and 111 were contract positions. A total of $6.5 million was spent on salaries. In addition to the paid employees, 2,459 volunteers contributed a great deal of unpaid time to the arts. This indicates a strong commitment to the arts in the community. The estimated annual economic impact of arts and cultural industries in Hamilton-Wentworth and Burlington amounts to $51 million, of which $39 million are direct expenditures (Hamilton and Region Arts Council, 1985).

ECONOMIC IMPACT OF THE PERFORMING ARTS IN PEMBROKE, 1985

Thirty-five questionnaires were mailed to organizations in the region. Of these, 22 replies were received of which 13 reported box office receipts and expenditures. The 13 groups reported combined box office receipts of $72,491 and, using Canada Council "short-hand" technique, estimated ancillary spectator expenditure at $76,841. The 13 groups spent $67,096 which, when combined with the expenditures of visitors, gives a total performing-arts-related expenditure of $143,937. If the suggested multiplier of 1.3 is applied to the latter figure then

the estimated economic impact of performing arts organizations on the Pembroke and area economy was $187,118 (Valley Arts Council, 1987).

THE ECONOMIC IMPACT OF THE ARTS IN KINGSTON AND REGION, 1982

This report, which was prepared by R.A. Werely (1984) for the Kingston Arts Board, is concerned with arts institutions, organizations and activities which may be categorized as either performing arts, the visual arts or selected participatory arts. This includes music, dance, theatre, art museums, galleries, public and private visual art displays, community festivals, arts service organizations, handicrafts and folk arts. For the purposes of this study, the media arts, experimental and mixed media arts, educational arts, literary arts and architectural arts were excluded.

During 1982 there were 65 professional and non-professional arts groups and organizations within the City of Kingston. Collectively they had memberships exceeding 12,300 and staged over 1,080 performances and events. Full-time positions in arts numbered 29, and 170 other individuals were employed for either parttime or seasonal work. Over 1,000 people were regular volunteers and over 200,000 tickets were sold to arts events.

Direct expenditures made by the 21 largest arts organizations or facilities in Kingston totalled $2,114,588 in 1982 of which $812,944 was paid to employees, $973,011 were spent on purchases from local suppliers, $317,860 was spent on purchases from elsewhere, and $10,773 was paid to the municipal governments. When multipliers were applied to these figures the total impact of these direct expenditures was estimated to be $3,359,586. It was further estimated that people attending arts-related events spent $476,930 which, when multiplied by a local purchases multiplier of 1.8, yields an impact of $858,474. Thus, the total economic impact was estimated to be $4,218,060. Furthermore, it was determined that for every $100 of initial expenditure injected into the local economy, a total of $124 would be produced by retail trade, $117 by the heavy construction industry, and $160 by the arts sector. It is concluded that "on a dollar for-dollar basis the economic impact of the arts is at least comparable to those of other sectors, and that this industry is therefore deserving of attention based on economic considerations alone" (Wereley, 1984).

THE ECONOMIC IMPACT OF THE ARTS ON SUDBURY AND REGION, 1984-85

This investigation concluded that there were 34 nonprofit organizations, 550 artists, craftsmen and performers and 158 arts-related businesses in the Sudbury region. The arts-related sectors included in this study employed 1,223 full-time and 820 part-time people, and over 1,300 volunteers gave their time to aid the 34 arts organizations. The direct impact of the arts organizations on the Sudbury region was $24.5 million which,

once a local multiplier is applied, rises to $31.8 million. When the impacts of the artists and arts-related business is added, the total economic impact of the arts on Sudbury was estimated to be $38,945,400 (S. Anne, 1985).

THE BLYTH, ELORA, SHAW AND STRATFORD FESTIVALS 1985

Wall and Mitchell (1985 and 1986) have produced five reports concerned with the economic impact of cultural festivals on mid-sized Ontario towns. Individual reports are available on each of four festivals, with the final report being a comparative study. Some of the findings of these studies have been mentioned elsewhere in this document.

Three major objectives guided the research:

1. to examine the socio-economic characteristics, attendance patterns, origins and opinions of festival-goers;

2. to determine the magnitude and location of organization and visitor expenditures;

3. to determine the festivals' impacts through documentation of: a. the business history of each community both before and after initiation of the cultural event: and b.the proportion of business and the attitudes of businessmen associated with the cultural event.

Data were collected from three main sources: questionnaire surveys distributed to patrons and local business proprietors; Dun and Bradstreet Reference Directories, and information provided from festival personnel, including financial statements. A wealth of data were collected which are available in the original reports, and the interested reader is referred to these. Only a brief qualitative statement of findings is presented here.

It is documented that festivals have positive economic impacts on the local economies. These impacts are derived from two sources: expenditures of visitors and the expenditures of the festival organization within the local community. The magnitude of these impacts varies according to the age and success of the cultural event.

At the risk of oversimplification, it is concluded that as a festival gains recognition, greater visitor impacts are realized. This is a result of a number of interrelated factors. Recognition results in festival expansion, an increase in ticket prices to cover the additional costs associated with this expansion, and a broadening of market, from a predominantly local to regional clientele of higher income and occupational status. Market expansion encourages an increase in trip duration which, subsequently, creates the opportunity for increased visitor expenditures.

Furthermore, the influx of additional tourists results in a change in community infrastructure to serve the needs of festival visitors. Restaurants, gift shops and motels emerge to sustain festival visitors while in the community. This sequence of events suggests there is a symbiotic relationship between the festivals and local business firms: the festival creates the market necessary to support new tourist businesses, while local firms provide the necessary services to sustain festival visitors. At the same time, the festivals both benefit from and contribute to the ambience of their communities.

While the impact of visitors to well-established festivals (i.e. Stratford and Shaw) is greater than the impact oftheir younger counterparts (Blyth and Elora), benefits per business derived from festival organization expenditures are greater in the smaller towns with younger festivals. There is evidence to suggest that as a festival expands, and its requirements become greater and more specialized, there is a tendency to look to other communities to satisfy these needs. This is to some extent inevitable, but it reduces the size of the local economic impact and may cause resentment among local entrepreneurs. Hence, while in absolute terms the larger festivals (Stratford and Shaw) contribute greater sums to their local economies, the relative impact of organization expenditures (i.e. festival expenditure per local business) is less than in the communities of Blyth and Elora.

It is further demonstrated that, in all four cases, all sectors of the economy benefit from expenditures of visitors and the festival organization within the local commu nity. Furthermore, it appears that while the impact of visitors is somewhat greater in those communities with well-established festivals, the impact per business of festival organization expenditures is greater for those festivals which have yet to attain national recognition.

SUMMARY

In this section, synopses of a number of recent economic studies of the arts in Ontario were presented. The studies attest to both an increasing interest in and attention to the economics of the arts. They also indicate the considerable economic consequences of artistic activities in a wide variety of situations. Some of the studies are of specific events, others are artistic activities in particular regions but, whatever the approach, all of the studies draw attention to the economic significance of artistic activities to the communities in which they take place.

SOCIO-CULTURAL IMPACTS

The purpose of this report is to document the economic impacts of the arts in Ontario. It follows that the non-economic consequences of the arts are beyond the scope of this study. However, some may regard the separation of impacts into those with and without economic dimensions as arbitrary, for it is difficult to think of any impact which does not have some economic implications.

Furthermore, some devotees of the arts may believe that the economic contribution of the arts is insignificant in comparison with their less tangible values. It is appropriate therefore, for the sake of balance and completeness, to make some observations on the sociocultural impacts of the arts. While there is a wealth of numerical information on various components of the economic impacts of the arts, this is not the case with socio-cultural impacts. There is a dearth of quantitative information on socio-cultural impacts for it is extremely difficult to measure such impacts in other than qualitative terms. A number of studies, such as those by Chartrand (1984 and 1986), and Violette and Taqqu (1981), address many of the broader dimensions of the arts but the literature is fragmented and the reports are discursive rather than data-based or analytical. Wall and Mitchell (1984), in their studies of symphony orchestras, employed survey data to identify a wide range of benefits which were attributed to the arts by concertgoers, but their information is not readily applied to the arts as a whole or at the provincial level. In the absence of definitive information, this report will simply draw attention to some of the major socio- cultural impacts which are attributed to the arts. At the individual level, it is evident that, for many residents of the province, the availability of artistic experiences is an important contributor to their quality of life. The adjectives which are used to describe artistic experiences are many and varied, but include such terms as inspiring, exciting, stimulating, entertaining and enjoyable. For many people, the arts provide peak experiences which are of much greater significance than is indicated by the time and money which they devote to the arts.

The relaxation and renewal which many associate with the arts, indicate that there are many psychological benefits and that the arts can contribute to the promotion of mental health. The arts also have undoubted educational value. The arts incorporate some of the higher forms of human achievement; their practice can engender discipline and innovation and their appreciation can foster insight into the characteristics of culture and society. The arts are guardians of our heritage and also create new heritage for future generations.

The arts are, at the same time, both conservative and innovative. In times of rapid change they can link us with our past and provide an element of continuity. At the same time, they can con-

tribute to the formation of an innovative climate which fosters invention and new design, which encourages technological change, and which promotes research and development. The Macdonald Royal Commission (1985) indicated the significance of the arts for design and creative innovation, enabling smaller economies to compete effectively in the world economy. At the community level, an active artistic life is an important component in the offerings of a healthy community. It has frequently been argued that new businesses, and the energetic and innovative people associated with them, are most readily attracted to lively towns and cities. The arts and their facilities can be the catalyst for urban regeneration and redevelopment. New arts facilities have contributed to the revitalization of the downtown areas of such Ontario cities as Hamilton and Toronto.

Two significant instances of this in Toronto are the St. Lawrence Centre and the Royal Alexandra Theatre. The arts can also be a source of local pride among residents of a community or a country. Successful artists are excellent ambassadors. The arts are among the easiest and most spectacular means through which Ontario can sell Ontario and its products abroad. Foreign tours by major artistic organizations as well as visits by smaller companies and individual performers and travelling exhibitions are effective in attracting attention and establishing a climate in which Ontario goods and ideas can be promoted and sold, and foreign investment in Ontario encouraged.

This brief statement has drawn attention to the many and varied impacts attributed to the arts. They can best be summed up by reiterating that the arts contribute positively to the quality of life. These materials are included here to provide a brief complement to the economic focus of the remainder of the report, and to emphasize that an economic assessment is only one perspective. It does not encompass the total benefits to the province derived from the arts.

SUMMARY AND CONCLUSIONS

Arts activities in both Canada and Ontario are concentrated in Toronto, so that a vibrant arts community in the province is vital to artistic activity in the country as a whole. While the arts have long been concentrated in urban areas and continue to be so, the growth of the last two decades has increased the accessibility of the arts to residents of communities outside of Toronto, and a number of additional centres of excellence have come into being. The magnitude and characteristics of the clientele for the arts in Ontario were discussed through an examination of the art audience and attendance at artistic events. The growth in artistic activity on the production side has been paralleled by an increase in attendance at artistic events.

There has also been a considerable broadening of the audience so that a rising proportion of residents of Ontario are participating in the arts. These trends are expected to continue, fueled by rising levels of education, increasing participation of women in the labour force, and the aging of the population. Although participation has increased, cost is a major factor affecting attendance, especially for young adults, females, those with lower incomes, and frequent participants who would like to attend more. This must be addressed if the growth potential is to be realized. Large sums of money are currently spent on the arts. The income of arts organizations is comprised of expenditures by federal, provincial and municipal governments, plus box office revenues and other earned income. Federal government expenditures on the arts have declined in real terms since they reached a peak in 1978-79. There has been a slight rise in both provincial and municipal financial support for culture in Ontario since the 1970's, but cultural expenditures constitute only a very small proportion (0.5 per cent and 1.8 per cent respectively) of such government expenditures, and the contribution to the arts is only a part of this.

Ontario is approximately average among provinces in per capita expenditures on culture. Private and business donations and other fund-raising activities are extremely important to the arts in Ontario, as are box office revenues and other earned income. However, an increased reliance upon box revenues would reduce the accessibility of the arts. Arts organizations and individual artists spend their incomes and, in this way, the money is returned to and penetrates all sectors of the provincial economy. At the same time, many artists make a variety of specific expenditures as a consequence of the practice of their art. Such requirements give rise to specialized businesses to cater to these needs.

In addition, as a by-product of their attendance at arts events, members of the audience spend money on a wide variety of purchases. To the extent that such members of the audience are at

tracted from out-of-town or outside of the province, they can be viewed as tourists and their expenditures considered as a part of the impacts of tourism. It has been frequently stated, but seldom proved, that businesses are attracted to places with a high quality environment, including the availability of superior artistic and cultural facilities. Such claims have been documented through detailed investigations of the impacts of festivals at Blyth, Elora, Niagara-on-the-Lake and Stratford. Synopses of a number of recent economic studies of the arts in Ontario have been presented. Some of the studies are of specific events, others are of artistic activities in particular regions but, whatever the approach, all of the studies draw attention to the economic significance of artistic activities to the communities in which they take place. The following situations were discussed: the Tutankhamun and Van Gogh exhibitions at the Art Gallery of Ontario, Toronto; studies of the Stratford, Shaw, Blyth and Elora Festivals and the Toronto International Festival; the Toronto and Kitchener-Waterloo symphony orchestras; and the impacts of the arts in Hamilton, Pembroke, Kingston, and Sudbury.

In order to place the investigation in a broader context, and to complement the economic analyses, some socio-cultural impacts of the arts were discusses briefly.

CONCLUSIONS

The data for this report were derived primarily from published documents supplemented by information gathered from personal and telephone interviews with key personnel in government and the arts. Because of the different definitions of the arts employed in various statistical sources, the different dates of data acquisition and different degrees of resolution of the data, it is not possible to combine the results of the preceding sections to come up with simple up-to-date measures of the economic impacts of the arts on Ontario. The most recent detailed estimate of the economic impact of the arts industry on Ontario is that conducted for 1983 by the Canada Council, dated December 1986, and made available part way through investigation. The major points of their findings are presented in Table 1. The major sources of information from which the results were compiled were the 1981 census, and 1983 revenues, wages and salaries. The multipliers were applied according to the Canada Council (1982) Short-Hand Technique for Estimating the Economic Impact of the Performing Arts. The data on the cities are weighted upwards to allow for the concentration of arts activities which takes place in metropolitan areas. The data on Ottawa do not include the Hull part of the metropolitan area.

The Canada Council suggests that the Province of Ontario contained 35.4 per cent of the country's population but generated 46.0 per cent of national arts activity (however, the exact meaning of the latter figure remains unclear). Provincial employment in the arts was reported to be

TABLE 1: Standardized Estimate of the Economic Impact of the Arts Industry 1983

ITEM (1)	CANADA	ONTARIO	TORONTO	HAMILTON	OTTAWA-HULL Ontario Part (CMA Total)	ONTARIO OTHER
Population	24,343,181.0	8,625,107.0	2,998,947.0	542,095.0	547,399.0	4,356,666.0
% of National Population	100.0%	35.4%	12.3%	2.2%	2.2%	17.9%
% of National Arts Activity	100.0%	46.0%	--	--	--	--
% of Provincial Population	--	100.0%	34.8%	6.3%	6.3%	52.6%
Arts Activity Cluster Effect (2)	--	--	40.0%	8.0%	8.0%	--
			-- millions of current dollars --			
Arts Industry Revenue	$9,234	$4,248	$1,699	$340	$340	$1,869
Arts Industry Wages and Salaries	$3,143	$1,446	$578	$116	$116	$636
Income Multipliers (3)						
Local	--	--	1.6	1.5	1.5	--
Provincial	--	1.6	1.6	1.6	1.6	--
National	2.1	2.1	2.1	2.1	2.1	--
Arts industry Impact						
on Local Economy	--	--	$3,627	$510	$510	--
on Provincial Economy	--	$6,797	$3,627	$544	$544	$2,082
on National Economy	$19,391	$8,920	$4,760	$714	$714	$2,732
Arts Industry Employment	234,280	107,769	43,108	8,622	8,622	47,417
Arts-Related Employment	414,040	182,160	72,864	14,573	14,573	80,150

NOTES:
(1) Arts industry economic impact based on 1983 revenue and wages and salaries figures
Population and employment figures and ratios based on 1981 census.
(2) Preliminary estimate
(3) A Short-Hand Technique for Estimating the Economic Impact of the Performing Arts, Research & Evaluation, Canada Council, March 1982.
Mulitipliers are used to estimate the cumulative economic impact of circulating income on the economy.

107,769, rising to 182,160 if all arts-related employment is included. It is suggested that the revenue of the arts industry of the province was $4,248 millions of which $1,446 millions was arts industry wages and salaries. If economic multipliers of 1.6 (provincial) and 2.1 (national) are applied to the revenue figures, then it is suggested that the total arts industry impact on the provincial economy was $6,797 millions, and on the national economy, $8,920.

Ontario generated almost half (46 per cent) of the total arts industry impact of $19,391 millions on the national economy. Data on the three major urban centres and all other parts of the province (called the hinterland) are also indicated in Table 1. The data clearly indicate the urban orientation of much arts activity and also emphasize the primary position of Toronto in both the province and the country. With 12.3 per cent of the country's population, Toronto has 18.4 per cent of the country's arts industry employment and 17.6 per cent of the arts-related employment. Approximately one quarter (24.5 per cent) of the country's arts industry impact is stimulated in Toronto.

Somewhat similar information is available on the performing arts alone (Table 2). It was estimated that the total performing arts-related expenditure in Ontario was $103,463,000 in 1983. When multipliers are applied to this expenditure it is estimated that the provincial economic impact was $165,540,800, and the national economic impact of these expenditures was $217,272,300. Of the Ontario performing arts-related expenditures, 49.5 per cent were made in Toronto, which again indicates the considerable importance of Toronto.

TABLE 2: Economic Impact of the Performing Arts in Ontario ($ 000)

1983

	ONTARIO	TORONTO CMA	HAMILTON CMA	OTTAWA-HULL CMA
BOXOFFICE	33,500	14,993	911	209.0
Ancillary Spectator Expenditure	35,510	15,893	966	221.5
Total Company Expenditure	67,953	35,322	2,287	1,189.0
Total Performing Arts Related Expenditure	103,463	51,215	3,253	1,410.5
Economic Impact				
Local	--	81,943.3	4,879.0	2,115.8
Provincial	165,540.8	81,943.3	5,204.3	2,256.9
National	217,272.3	107,550.6	6,830.7	2,962.1

Source: Canada Council Performing Arts Data Base, Research and Evaluation, October
A Short-Hand Technique for Estimating the Economic Impact of the Performing
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